ICD-10

MICROMD PM VERSION 10.0

SOFTWARE CONFIGURATION

HENRY SCHEIN®

MicroMD®

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PREFACE

ABOUT THE MANUAL

This manual is designed for resellers of MicroMD PM software and for Henry Schein Medical Systems training personnel as a guide through the initial setup of MicroMD PM. You can follow along with this manual and train yourself in setting up a practice called **Microsys Medical**. Sample data for you to use for this practice appears within the step in *Chapter 1. MicroMD PM Setup.*

The purpose of this manual is to explain the basic procedures needed to complete the initial set up of the program, beginning after the installation of MicroMD PM. These instructions prepare the system for overall office production.

> **STOP |** Before beginning the procedures contained in this manual, verify that the computer network and MicroMD PM have been set up and installed as indicated in the *MicroMD PM Software Installation Manual*. This configuration manual does not include installation procedures for MicroMD PM or networking and hardware setup.

How This Manual is Organized

This manual is written on the assumption that the reader already knows how to use the program. It lists each task involved in the initial setup in a simple step-by-step format. In other words, this manual describes what needs to be done and why it needs to be done. The *MicroMD PM User's Reference Manual* describes in-depth how to use it.

UNDERSTANDING TYPOGRAPHICAL CONVENTIONS

Before using this manual, it is important to understand the typographical conventions used to identify and describe information.

Cross-References

Cross-references to chapters, sections, page numbers, headings, etc. are shown in an *italic* typeface.

e.g., Refer to *Understanding Typographical Conventions* on page i.

Text You Type Using the Keyboard

Text that you type using the keyboard is shown in a `Courier` typeface.

e.g., Type `Anthony Smith` in the *Name* field.

Keys You Press and Buttons You Click

Keys that you press on the keyboard and buttons/icons that you click with the mouse are shown in a **bold sans-serif** typeface.

e.g., Press **Enter**.

e.g., Click **OK** to continue.

Dialog Box, Application Window Titles, and Field Names

The titles of dialog boxes and application windows are shown in *italics*. Field names and selections made from drop-down menus, etc. are also shown in *italics*.

e.g., The *Print Preview* dialog box appears.

e.g., Select *Commercial Insurance* from the drop-down list.

Notes, Warnings, Tips, and See Also

Notes, tips, warnings and "see also" references are provided throughout the manual. These provide additional information that is important for you to know about the topic.

> **NOTE |** A note is an important piece of information.

> **STOP |** You should definitely read the information in a warning. It could help you prevent a disaster.

> **TIP |** A tip table helps you with some interesting information about different ways to use the program.

MICROMD PM SETUP

CHAPTER 1

INTRODUCTION

This section describes the steps to be taken to set up MicroMD PM after installing the program. The descriptions are an overview of what needs to be done and why it needs to be done at each step.

> **STOP |** Before beginning the procedures contained in this manual, ensure the computer network and MicroMD PM have been set up and installed as indicated in the *MicroMD PM Software Installation Manual*.

LOG IN TO MICROMD PM

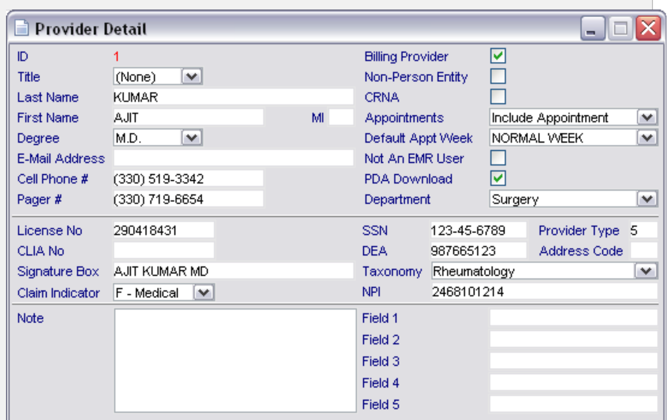
Procedure	Details
1. Double-click the *MicroMD PM* folder on the desktop.	For legacy systems, the folder name could be *Microsys Computing, Inc.*
2. Once the folder opens, double-click the **MicroMD PM** icon to start MicroMD PM.	The *MicroMD PM Login* window opens. 
3. Type `user` as the Username.	These are defaults for the supervisor. We strongly recommend that practices change these later.
4. Type `123` as the Password.	
5. Click **OK** to proceed.	

We have divided the following sections into steps to complete for the initial setup of MicroMD PM. This includes entering data into the system that builds the maintenance tables and setting up the general system settings.

STEP 1: ADD PROVIDER(S)

You must add providers to the system before you can complete any other step. The following procedures explain how to do this.

> **NOTE |** A key code is needed for additional billing providers added to the system. Contact Henry Schein Medical Systems, Inc. to obtain this key code.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Select Maint > Provider from the main menu.</td><td>The Provider List window opens.</td></tr>
<tr><td>2. Click the New icon on the Task Pane.</td><td>The Provider Detail window opens.

</td></tr>
<tr><td>3. Enter all applicable data.</td><td>If the provider is a billing provider, you must check the Billing Provider checkbox.

If the practice has more than one provider, fill in the Signature Box with this provider's name. For a practice with only one provider, the Signature Box can be filled in on the Practice Detail.

The Default Appt Week will be completed when setting up the appointment schedule. Save the provider and MicroMD PM assigns an ID number.

This is the last place that MicroMD PM looks for the CLIA No. The system looks for this number in the following order: Practice Location, Practice Detail, and Provider Detail.</td></tr>
<tr><td>4. Click the Save icon to save this provider.</td><td>MicroMD PM prompts you for the key code. Contact Henry Schein Medical Systems for the security key code for this provider. Once you save this entry, MicroMD PM assigns a unique system ID number to this provider.</td></tr>
<tr><td>5. Repeat steps 2 through 4 for each additional provider.</td><td></td></tr>
</table>

EXERCISE FOR MICROSYS MEDICAL

Create the following providers for Microsys Medical:

PROVIDER 1

Ajit W. Kumar, MD
Cell Phone: 330-509-1234
Pager: 330-716-5432
License No.: KU76543
SSN: 123-45-6789
DEA: 9876651
Taxonomy Code: Family Practice
Signature Box: Ajit Kumar, MD
Key Code = 9059-APEPZLO

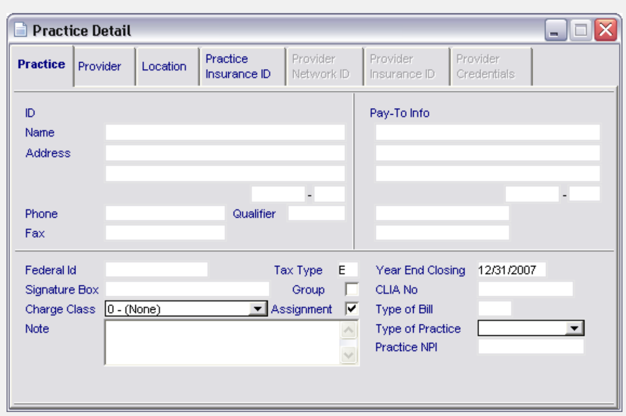
PROVIDER 2

William P. Davidson, MD
Cell Phone: 330-519-1234
Pager: 330-719-8881
License No.: DA12345
SSN: 321-98-7654
DEA: 9088753
Taxonomy Code: Family Practice
Signature Box: William Davidson, MD
Key Code = 10035-ADD8ADU

STEP 2: ADD THE PRACTICE(S)

After entering providers in the system, you must now create the practice(s).

> **NOTE |** A practice cannot be added to the system without a security key. However, for training purposes, the system allows you to create a practice with the name "Test Practice" without entering a key code. (We will not use the Test Practice for the examples in this manual.)

Procedure	Details
1. Select **Maint** > **Practice** from the main menu.	The *Practice List* window opens.
2. Click the **New** icon on the Task Pane.	The *Practice Detail* window opens. 
3. Complete all applicable data on the	If the *Signature Box* was completed in the *Provider Detail*

Procedure	Details
Practice tab.	window, you can leave this *Signature Box* blank. If the address where patients should send their payments is different from the practice's physical location, enter the appropriate name and address in the *Pay-To Info* fields. The *CLIA No* field on this window is the second place that MicroMD PM looks for that number. The system looks for the CLIA number in the following order: Practice Location, Practice Detail, and Provider Detail. Assign a *Charge Class* to a practice in a multiple practice system where different types of specialties may exist. This feature is useful when different charge amounts are needed for a procedure. You can enter the procedure in the system once, but assign different charge classes for different practices. Billing services find this quite effective. If the practice has a practice-level NPI, you can enter it now. Please refer to the main *MicroMD PM User's Reference Manual* under NPI for more details.
4. Continue with Step 3: Add the Provider(s) to the Practice.	

EXERCISE FOR MICROSYS MEDICAL

Create the following practice in your database:

Microsys Medical

790 Boardman Canfield Rd.

Boardman, OH 44512

Phone: 330-758-8832

Fax: 330-758-0182

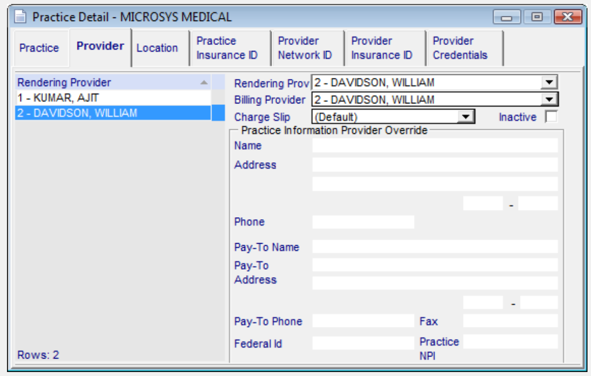
Clia # : 1D2589785

Type of Practice: Medical/Surgery

Key Code=2323-ASBHB7Z

STEP 3: ADD THE PROVIDER(S) TO THE PRACTICE

Now, you must add the provider(s) to the practice. You cannot create a practice until you create providers in the system. Each practice must have at least one provider associated with it.

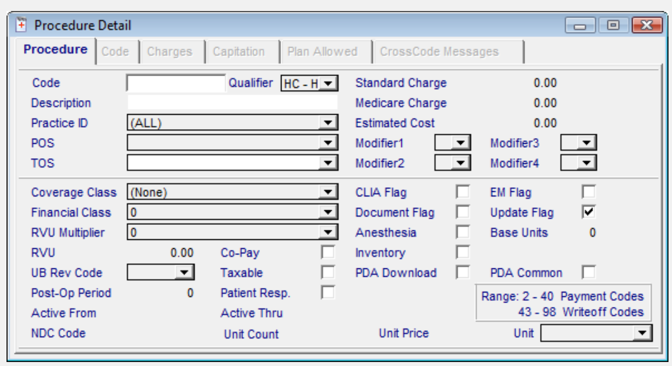
Procedure	Details
1. Select the **Provider** tab in the *Practice Detail* window.	
2. Use the *Provider* drop-down list to associate providers with this practice.	The user has the option to select a *Billing Provider* from the drop-down list, if different from the rendering provider. Only providers whose *Billing Provider* checkbox on the *Provider Detail* window is checked appear in this list. For multiple providers with different federal tax IDs, enter the individual provider's in the *Federal ID* field. This helps keep their billing separate. When posting, the system defaults to the billing providers assigned to each rendering provider in this window. Users can change the defaults when entering charges. Users have many reports available based on rendering or billing provider. Users can also choose a charge slip from the *Charge Slip* drop-down list to use for all of this provider's appointments. The choice made here overrides any other setting in MicroMD PM for the appointment or patient. Choosing *Default* uses the slip associated with the appointment class. Only complete *Practice Information Provider Override* fields if different from the practice.
3. Click the **New** icon on the Task Pane for each additional provider.	You will complete the other tabs on this window in later steps.
4. Click the **Save** icon after adding all providers to this practice.	The system prompts for a security key code, which you can obtain from Henry Schein Medical Systems, Inc.
5. Enter the key code and click **OK**.	You have successfully created a practice with providers.

> ## EXERCISE FOR MICROSYS MEDICAL
> Associate the providers you created in Step 1 with the practice you started in Step 2.
>
> Be sure you are in the correct practice. Select **Misc** > **Set Practice** from the main menu. Choose *Microsys Medical* from the *Practice List* window. (Or press the **F9** key to toggle through practices.)

STEP 4: ADD PROCEDURE CODES

Now, we must add procedure codes to the database. Only the most frequently used procedure codes need to be added at this time. Users can add other codes later.

> **STOP |** FOR MULTI-PRACTICE SINGLE DATABASE: If you want to specify a specific practice for a code, you MUST do so when creating the procedure code. You WILL NOT be able to edit this field later. Make the appropriate selection from the Practice drop-down list.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Select Maint > Procedure from the main menu.</td><td>The Procedure List window opens.</td></tr>
<tr><td>2. Click the New icon on the Task Pane to create a new code.</td><td>The Procedure Detail window opens.


NOTE | If the client has purchased the Code Load optional program, it imports diagnosis and procedure codes into MicroMD PM automatically. Refer to Appendix C for further information.</td></tr>
<tr><td>3. Enter all appropriate information for this new code.</td><td>You need to complete at least these fields for the code to function properly: Code, Description, Pos, Tos, and Standard Charge.
Other important fields to complete at this time if needed:
CLIA Flag</td></tr>
</table>

Procedure	Details
	▪ *Document Flag* ▪ *EM Flag* ▪ *Medicare Charge*
4. Click the **Save** icon on the Task Pane.	
5. Repeat steps 2 through 4 for each new code.	

EXERCISE FOR MICROSYS MEDICAL

Add the following procedure codes:

Code: 99213 Description: OV - Est. patient-expanded POS: 11 TOS:01 Standard Charge: 70.00 *Check EM Flag	Code: 82270 Description: Hemoccult POS: 11 TOS: 05 Standard Charge: 15.00
Code: 85025 Description: CBC w/differential POS: 11 TOS: 005 Standard Charge: 25.00 *Check CLIA Flag	Code: 99222 Description: Hospital Inpatient-Initial Comp. POS: 21 TOS: 01 Standard Charge: 126.00
Code: 93000 Description: EKG POS: 11 TOS: 01 Standard Charge: 56.00	

STEP 5: CREATE THE PAYMENT AND WRITE-OFF CODES

Next, you must create payment and write-off codes. Creating payment and write-off codes allow reporting based on these codes. These codes also make it easier when posting charges. The codes created here will be used later when configuring the system and entering insurance plans.

We recommend that you create payment and write-off codes for the major insurance companies.

The database comes preloaded with the following permanent codes.

Code	Description	Code	Description
1	PAYMENT CASH	101	ADJ-REDUCE PAYMENT
41	ADJ-REDUCE CHARGE	102	ADJ-INCREASE CHARGE
42	ADJ-INCREASE PAYMENT	103	REFUND
99	BALANCE FORWARD CREDIT	104	ADJ TO WRITE-OFF
100	ADJ TO REFUND	105	BALANCE FORWARD DEBIT

Codes 2 through 40 are reserved for payments and 43 through 98 are reserved for write-offs. We recommend that the payment and write-off codes be created in a consistent manner. Use the following formulas when assigning numbers to payment and write-off codes:

Payment = n (for example, the code for PAYMENT MEDICARE is 3)

Write-off = n + 40 (for example, the code for W/O MEDICARE is 43)

> **NOTE |** Payment and write-off codes can be created outside of this range, if necessary. Sometimes a practice may need to create more than 40 payment and write-off codes. Payment and write-off codes can be any number other than the system-assigned codes, but make sure to select the correct POS and TOS for the codes so the codes work properly.

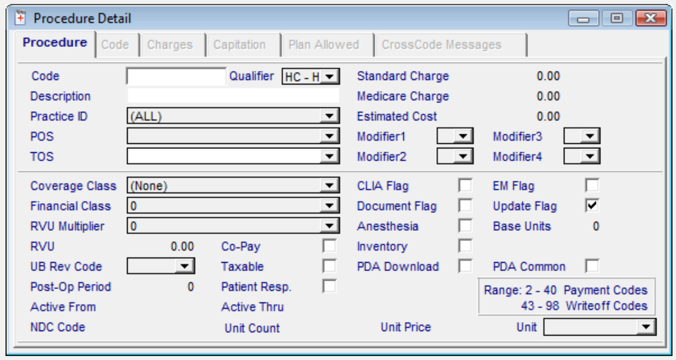
Users can search for codes using the payment and write-off fields throughout the system. If practices have developed consistent codes, those searches are efficient and helpful. For instance, if every payment code starts with "Pay," searches for "pay" return all of the payment codes. Also, if all write-off codes start with "W/O," searches for "w/o" return all of the write-off codes.

MicroMD PM comes loaded with the codes 10 – PMT MISC and 50 – W/O MISC. These two codes will probably be set as the default payment and write-off codes for the system. Payment and write-off codes do not need to be created for every insurance plan in the system; most likely, only the major insurance plans will have payment and write-off codes created for them.

Payment codes can also be created for co-pays at this time. When creating the code in the *Procedure Detail* window, check the *Co-Pay* box to indicate this code is a co-pay code. These codes allow reporting based on co-pay amounts. They also allow the day sheet to list co pays separately.

To create payment and write-off codes, follow this procedure.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Select Maint > Procedure from the main menu.</td><td>The Procedure List window opens.</td></tr>
<tr><td>2. Click the New icon on the Task Pane.</td><td>The Procedure Detail window opens.



</td></tr>
<tr><td>3. Enter all applicable information.</td><td></td></tr>
<tr><td>4. Click the Save icon.</td><td>You will address the other tabs on this window later.</td></tr>
</table>

EXERCISE FOR MICROSYS MEDICAL

Add the following payment and write-off codes to the Microsys Medical database:

PAYMENT CODE

Code: 3

Description: Payment Medicare

POS: PO Payment Other

(should default to this)

TOS: II-Insurance

(should default to this)

WRITE-OFF CODE

Code: 43

Description: W/O Medicare

POS: W1 Write-off

(should default to this)

TOS: II Insurance

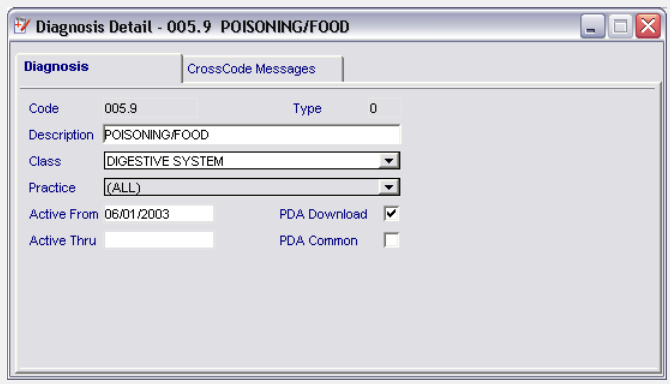
(should default to this)

STEP 6: ADD DIAGNOSIS CODES

The next step is adding the diagnosis codes.

> **STOP |** FOR MULTI-PRACTICE SINGLE DATABASE: If you want to specify a specific practice for a code, you MUST do so when creating the diagnosis code. You WILL NOT be able to edit this field. Make the appropriate selection from the Practice drop-down list.

Only the most frequently used diagnosis codes need to be entered at this point. Users can enter the rest of the codes later.

Procedure	Details
1. Select **Maint** > **Diagnosis** from the main menu.	The *Diagnosis List* window opens.
2. Click the **New** icon on the Task Pane to create a new code.	The *Diagnosis* Detail window opens.  **NOTE |** f the client has purchased the Code Load optional program, it imports diagnosis and procedure codes into MicroMD PM automatically. Refer to Appendix C for more information.
3. Enter the appropriate information for this new code.	The *Type* field allows the practice to have multiple descriptions for the same code.
4. Click the **Save** icon on the Task Pane.	
5. Repeat steps 2 through 4 for each additional code.	

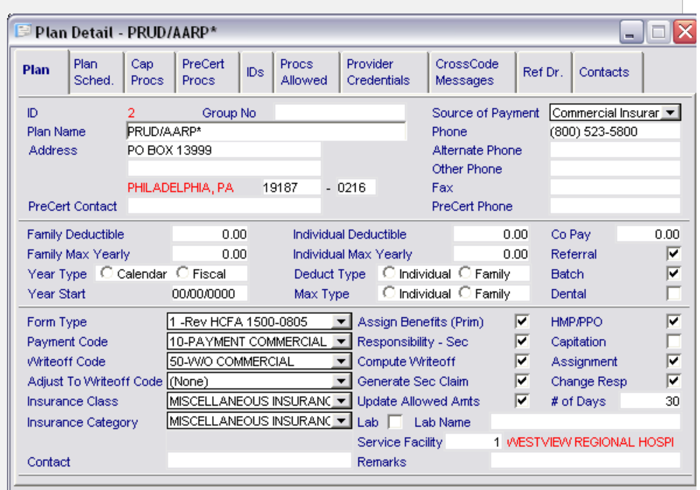
EXERCISE FOR MICROSYS MEDICAL

Add the following diagnosis codes to the system:

401.9	Hypertension
413.9	Angina-stable
466.0	Bronchitis-acute
535.00	Gastritis-acute
714.0	Arthritis-rheumatoid
845.00	Sprain-ankle
923.20	Contusion-hand

STEP 7: ADD INSURANCE PLANS

It is now time to add insurance plans.

Procedure	Details
1. Select **Maint** > **Plan** from the main menu.	The *Plan List* window opens. The *Plan List* is common to all practices in the current database.
2. Click the **New** icon on the Task Pane.	The *Plan Detail* window opens. 
3. Enter all appropriate information about the new plan.	**STOP |** You must choose the correct *Form Type*, *Payment Code*, *Writeoff Code*, *Insurance Class*, and *Insurance Category*.
	The *Form Type* ensures that the chosen form type is filled out correctly with the regulations of the insurance plan based on the form options set for that type. Setting the *Payment Code* and *Writeoff Code* helps the user track payment and write-offs made by insurance companies.

Procedure	Details
	If the claims for this plan are going to be sent electronically, here are some fields you must be sure to fill properly: ▪ *Source of Payment* places important payment information in the claim file ▪ *Insurance Class* tells the system whether to use a provider or group insurance IDs for electronic billing batches or printing forms ▪ **IDs** tab information as required by the insurance plan Refer to the electronic billing instructions for that particular electronic billing type for more information. Access these instructions online at www.micromd.com.
4. Click the **Save** icon on the Task Pane.	TIP | A **Copy Plan** icon on the Task Pane allows you to copy all information from one plan to another, including each tab.
5. Repeat procedures 2 through 4 for each additional plan.	

EXERCISE FOR MICROSYS MEDICAL

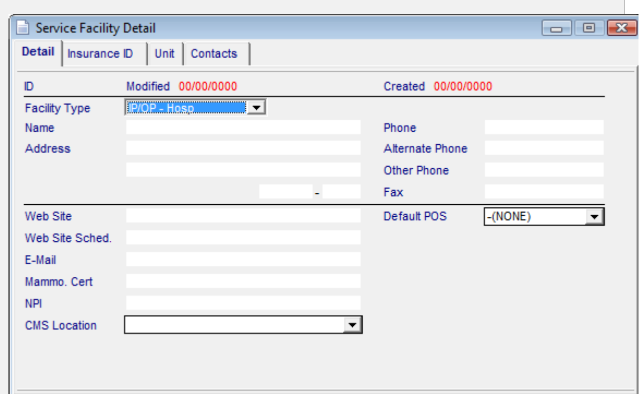
Add the following plans to the system:

PLAN 1 PalmettoGBA Medicare OH PO Box 57 Columbus, OH 43217 Source of Payment: Medicare Phone: 614-987-1234 Form Type: OH Medicare Payment Code: Payment Medicare Writeoff Code: W/O Medicare Insurance Class: Medicare	**PLAN 2** BC/BS Ohio PO Box 6018 Cleveland, OH 44101 Source of Payment: Blue Cross and Blue Shield Phone: 800-362-1279 Form Type: Envoy Payment Code: Payment Misc Writeoff Code: W/O Misc Insurance Class: Blue Shield
PLAN 3 United Health Care PO Box 2158 Pittsburgh, PA 15230 Source of Payment: Commercial Phone: 800-724-8898 Form Type: Envoy	

EXERCISE FOR MICROSYS MEDICAL Add the following plans to the system:	
Payment Code: Payment Misc Writeoff Code: W/O Misc Insurance Class: Miscellaneous	

STEP 8: ADD SERVICE FACILITIES

After adding the plans, you must now create the service facilities.

Procedure	Details
1. Select **Maint** > **Service Facility** from the main menu.	The *Service Facility List* window opens. The *Service Facility List* is a user-defined list of hospitals, nursing homes, and other facilities where practices perform services. It is common to all practices in the database. A service facility is selected at the time of charge entry and prints in box 32 of the CMS form.
2. Click the **New** icon on the Task Pane.	The *Service Facility Detail* window opens. 
3. Enter all appropriate information about this service facility.	**NOTE |** Remember to enter the service facility's insurance ID number under the **ID** tab so when billing the insurance carrier, the correct information prints in box 32 of the CMS form. If you have an entry on the **ID** tab, you MUST be sure to select an appropriate qualifier or the system does not see these entries.
4. Click the **Save** icon on the Task Pane.	
5. Repeat steps 2 through 4 for each new facility.	

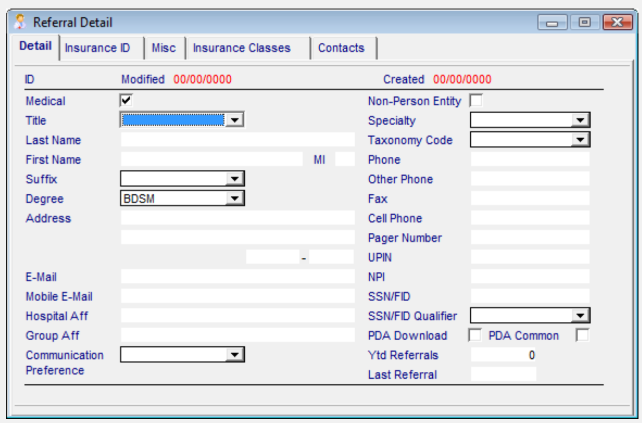
EXERCISE FOR MICROSYS MEDICAL

Add the following service facility to the system:

Westview Regional Hospital
194 Bellview Ave
Youngstown, OH 44501
Phone: 330-746-9834

STEP 9: ADD REFERRING PHYSICIANS

After adding service facilities, we must now add the referring physicians.

Procedure	Details
1. Select **Maint** > **Referring Doctor** from the main menu.	The *Referral List* window opens.
2. Click the **New** icon on the Task Pane to add a new referring physician.	The *Referral Detail* window opens. 
3. Enter all appropriate information for the referring physician.	You must specify the referring doctor's name. Other fields are optional. Labels and various reports use some of these fields. If you have an entry in any ID field, you MUST be sure to select an appropriate qualifier or the system does not see those entries. Some insurance plans require the referring physician information – such as name and UPIN – for specified procedures during claims processing. The referring doctor name and UPIN print in box 17 and 17a of the CMS form. **NOTE |** Remember to enter the referring doctor's insurance ID number under the **Insurance ID** tab when required by the insurance carrier. You MUST also have the correct qualifier assigned.

Procedure	Details
4. Click the **Save** icon on the Task Pane.	
5. Repeat steps 2 through 4 for each referring physician.	

EXERCISE FOR MICROSYS MEDICAL

Add the following referring physician to the system:

Carl P. Rubino, MD
789 West Blvd.
Youngstown, OH 44512
Phone: 330-756-1332
Fax: 330-758-9908
Pager: 330-509-9817
UPIN: U96609
Specialty: Dermatology

STEP 10: ADD EMPLOYERS (OPTIONAL)

We can now add the employers to the system. This is an excellent way to track where patients work.

Procedure	Details
1. Select **Maint** > **Employer** from the main menu.	The *Employer List* window opens.
2. Click the **New** icon on the Task Pane.	The *Employer Detail* window opens. The *Name* is the only required field. The user can assign employers from the *Patient Detail* window or in the *Insured Info* section of the **Plan Sets** tab. Users can run a report of employers in the system. The **Plans** tab lists the insurance plans this employer carries.
3. Enter all appropriate information for this employer and the plans associated with this employer.	
4. Click the **Save** icon on the Task Pane.	
5. Repeat steps 2 through 4 for each additional employer.	

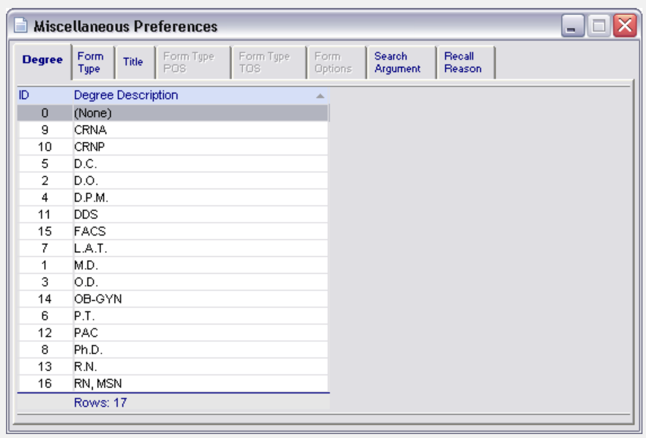
EXERCISE FOR MICROSYS MEDICAL

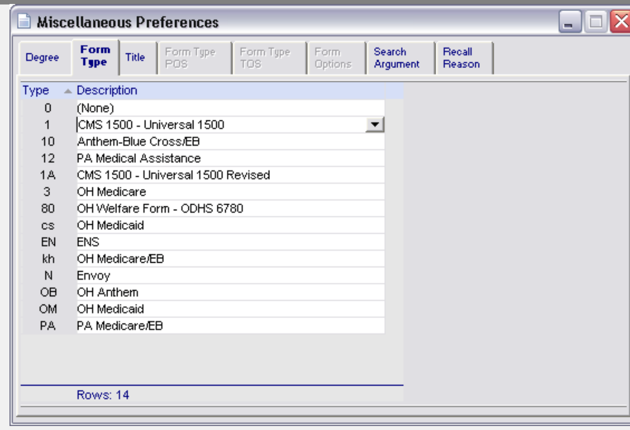
Add the following employer to the system:

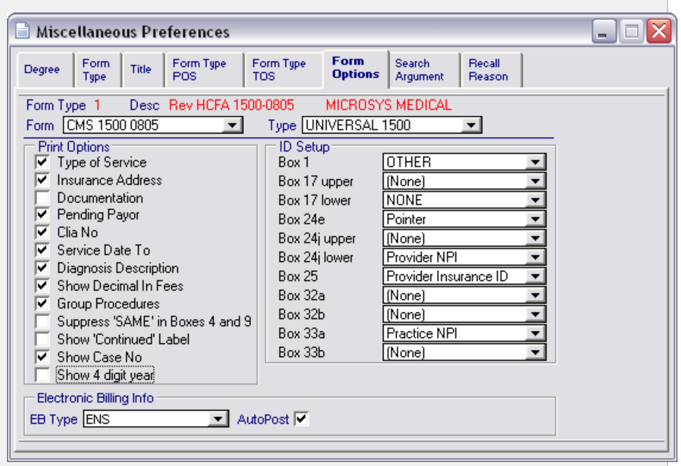
Henry Schein Medical Systems, Inc.
760 Boardman-Canfield Rd.
Boardman, OH 44512
Contact: Carrie
Phone: 330-758-8832
Fax: 330-758-0182

STEP 11: SET UP MISCELLANEOUS PREFERENCES

The next step is to set up the Miscellaneous Preferences, including users and form types.

Procedure	Details
1. Select **Setup** > **Miscellaneous Preferences** from the main menu.	The *Miscellaneous Preferences* window opens. 
Degree Tab	
2. It is not essential to make any changes to the **Degree** tab at this time.	The **Degree** tab lists all the medical degrees available throughout the system. Several degrees already exist in the system by default but the user can make any necessary additions. The degree fields are not required throughout the system.
Form Type Tab	
3. Click the **Form Type** tab.	The **Form Type** tab lists the various form types for processing both electronic and paper claims.

Procedure	Details
	
4. Click the **New** icon on the Task Pane to add a new Form Type.	Refer to *Chapter 2: EB Setup* for more detailed electronic billing setup information.
5. Manually enter an identifier in the *Type* column (a maximum of two characters).	
6. Select an available *Description* from the drop-down list or type a new one.	If the *Description* was selected from the drop-down list, it has predefined form options. The predefined form options appear on the **Form Options** tab. Double-check these options for your needs and save them. If the *Description* was typed, the user must specify the form options. The **Form Options** tab is available when the user selects a *Form Type* or creates a new one.
7. Click the **Save** icon on the Task Pane.	
Titles Tab	
8. It is not essential to update the **Titles** tab at this time.	This tab lists all the courtesy titles used in the program. The use of these titles is optional.
Form Type POS Tab	
9. It is not essential to update the **Form Type** POS tab at this time.	This tab is available when the user selects a form type on the **Form Type** tab. The **Form Type POS** tab contains the user-defined listing of the standard place of service (POS) codes and the required POS codes for a given form type as specified by certain insurance carriers. For example, an insurance carrier may require "03" in the POS field for inpatient hospital services in place of the standard POS of "21." The system replaces the standard value with this conversion code when printing the claim or batching claims for electronic billing.

Procedure	Details
Form Type TOS Tab	
10. It is not essential to update the **Form Type TOS** tab at this time.	This tab is available when the user selects a form type on the **Form Type** tab. The **Form Type TOS** tab contains the user-defined listing of the standard type of service (TOS) codes and the required TOS codes as specified by certain insurance carriers. For example, an insurance carrier may require "60" in the TOS field for medical services in place of the standard TOS code of "01". The system replaces the standard value with this conversion code at the time of printing the claim or batching claims for electronic billing.
Form Options Tab	
11. Select a form type on the **Form Type** tab, and then click the **Form Options** tab to set options for the selected form.	The **Form Options** tab allows the user to fill in the various form options required for each form type so claim forms have all the necessary information in the proper place as required by the insurance carriers. **STOP |** You MUST set this tab up correctly. Form Options specifications are available on the Reseller Support site to help guide you for different carriers. 
12. To access and set up the *Electronic Billing Info* section of this tab, you must click the **New** icon from the vertical task bar.	The *Electronic Billing Info* section appears at the bottom of the window.
13. Choose the appropriate electronic billing type from the *EB Type* drop-down list.	MicroMD PM prompts you for the key code. Contact HSMS for the security key code for this type. If you do not see your clearinghouse in the drop-down, you must list the clearinghouse on the **Additional Modules** tab in *Practice Preferences* and enter the key code when prompted. This helps you avoid entering the same key code multiple times when setting up multiple form types to the

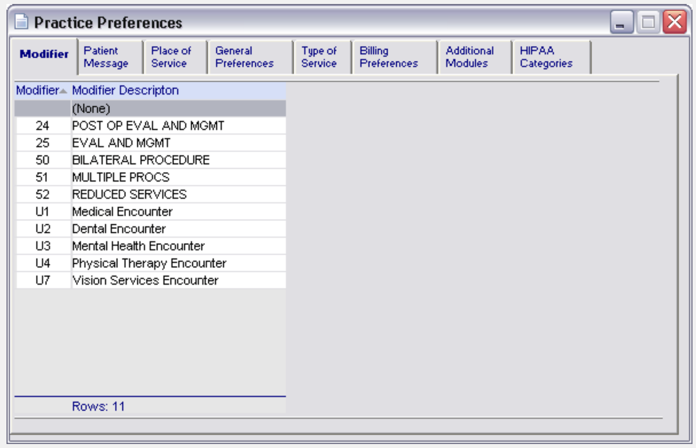
Procedure	Details
	same clearinghouse *EB Type*.
14. Place a check mark in the *AutoPost* box, if applicable.	A check in this box makes this form type appear in the drop-down list for AutoPosting (under **Billing** > **AutoPayment Posting**). Contact HSMS for the security key code to receive remits. If you select an EB Type and this checkbox at the same time, MicroMD PM prompts you for one key code.
15. Click the **Save** icon on the Task Pane to save all options for the form.	
16. Repeat steps 11 through 15 for each form.	
Search Arguments Tab	
17. It is not essential to update the **Search Argument** tab at this time.	The **Search Argument** tab is blank until the user creates entries. The list then contains all of the search arguments created by the user. This listing helps to keep track of items that the computer does not normally record. For example, a doctor may want to track how many patients were referred by another patient. The practice creates a search argument named "Patient Referral". Users can assign this argument to patients on the *Patient Detail* window under the **Misc** tab. They can then generate reports based on *Search Argument* in the report options window.
Recall Reason Tab	
18. It is not essential to update the **Recall Reason** tab at this time.	The **Recall Reason** tab is blank until the user creates entries. Then it contains a list of patient recall reasons, the number of days needed for a return visit, the associated *Appointment Class* and the *Recall Activation* sets for that reason. A recall can be set up for a patient by clicking the **Recall** icon from the floating task bar on the *Patient Detail*, *Charges*, *Payments*, and *Appointment* windows.

EXERCISE FOR MICROSYS MEDICAL

Create a search argument called Patient Referral.

STEP 12: SET UP PRACTICE PREFERENCES

After completing the *Miscellaneous Preferences* window, the next task is to set up the *Practice Preferences*. Practice preferences must be set for each practice in a multi-practice system.

Procedure	Details
1. Select **Setup** > **Practice Preferences** from the main menu.	The *Practice Preferences* window opens. 
Modifier Tab	
2. Click the **New** icon on the Task Pane.	This tab allows you to enter the modifiers required for the practice when posting charges.
3. Enter the *Modifier* and the *Modifier Description*.	The maximum field length for the *Modifier* code is two characters. The maximum field length for the *Modifier Description* is 30 characters.

EXERCISE FOR MICROSYS MEDICAL

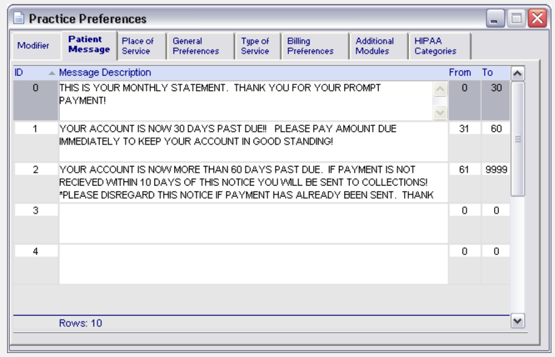
Add the following modifiers:

50 – Bilateral Procedures

51 – Multiple Procedures

52 – Reduced Services

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td colspan="2">Patient Message Tab</td></tr>
<tr><td>4. It is not essential to update the Patient Message tab at this time, unless the practice wants to print bills and/or statements.</td><td>

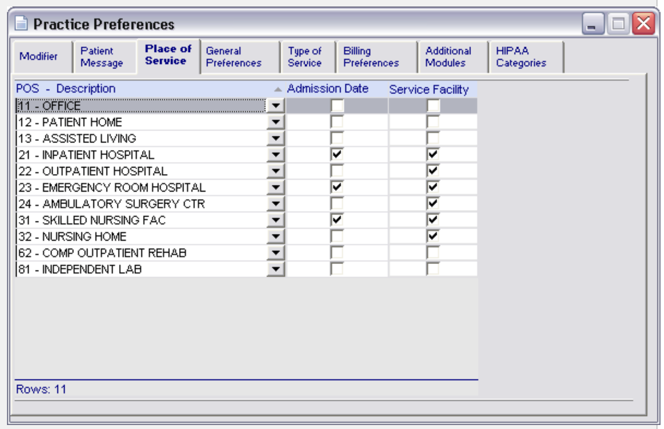


The Patient Message tab contains patient dunning messages that print on the bottom of bills and statements. The user has the option to create up to 10 messages and can change the value of From column. The To column updates automatically based on the From column.</td></tr>
</table>

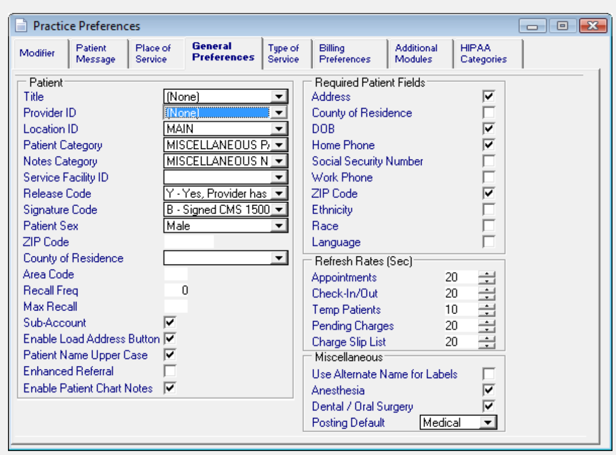
EXERCISE FOR MICROSYS MEDICAL

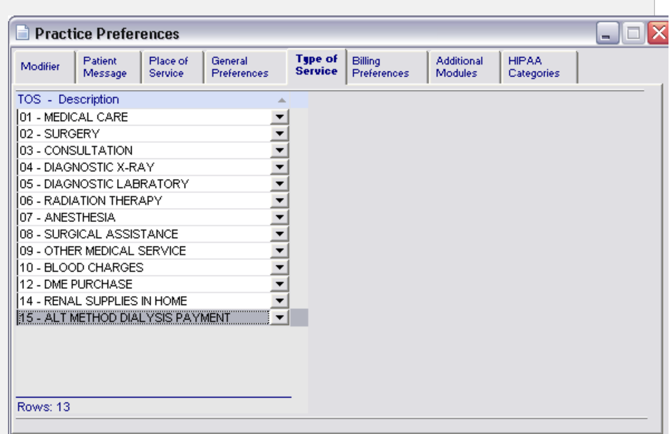
Create the following patient messages to print on the client's bills/statements:

From 0 to 30 days	From 31 – 9999 days
ID = 0	ID = 1
Your insurance has made payment and the balance due is now patient responsibility.	Your account is now past due. Please submit payment before your account is turned over to collections.

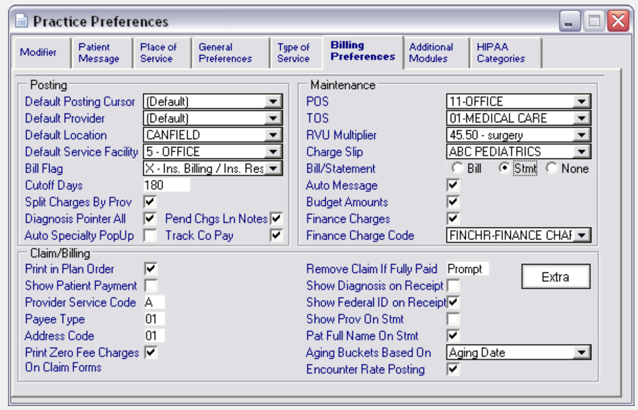
<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td colspan="2">Place of Service Tab</td></tr>
<tr><td>5. Click the Place of Service tab.</td><td>


The Place of Service tab contains a list of POS codes where the provider can perform services. This list is specific to a practice, and MicroMD PM pulls this list from the System POS tab on the System Preferences window. Check the Admission Date box to indicate to MicroMD PM that this POS must have an admission/discharge date from the sequence in the electronic file.</td></tr>
<tr><td>6. Click the New icon on the Task Pane and select the appropriate codes from the drop-down list.</td><td></td></tr>
<tr><td>7. Click the Save icon on the Task Pane.</td><td></td></tr>
<tr><td colspan="2">General Preferences Tab</td></tr>
<tr><td>8. Click the General Preferences tab.</td><td>The General Preferences tab allows users to set some of the general defaults for the practice. Some fields cannot be completed, as the items in the list have not been created yet.


</td></tr>
</table>

Procedure	Details
9. Set all defaults for the practice.	Most important at this time are: ▪ *Release Code* Indicates the level of authorization for the release of patient information ▪ *Signature Code* Indicates the source of the patient or subscriber authorization signatures and how the provider stores that signature You cannot set the following items at this time: ▪ *Location ID* ▪ *Patient Category* The *Required Patient Columns* section controls the fields that the user MUST complete or they cannot save the patient entry. **STOP |** Once you have created your location(s), you MUST return and set your location default.
10. Click the **Save** icon on the Task Pane.	
Type of Service Tab	
11. Click the **Type of Service** tab.	The **Type of Service** tab contains a list of TOS codes of the services the provider performs. This list is specific to a practice, and MicroMD PM pulls this list from the **System TOS** tab on the *System Preferences* window. 
12. Click the **New** icon on the Task Pane and select the appropriate codes from the drop-down list.	
13. Click the **Save** icon on the Task Pane.	

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td colspan="2">Billing Preferences Tab</td></tr>
<tr><td>14. Click the Billing Preferences tab.</td><td>The Billing Preferences tab contains some of the various default values for patient/insurance billing.



</td></tr>
<tr><td>15. Set the defaults for the billing of this practice.</td><td>Most important at this time are:

- *Bill/Statement*

  Default when entering a new patient in system

- *Auto Message*

  Check this box to print the appropriate patient message automatically at the bottom of bills/statements based on the account aging and the last payment date.

STOP | Before posting any charges in the system, you MUST select the *Default Location* and the *Default Service Facility*. Return to this tab after you create locations in the system.</td></tr>
<tr><td>16. Click the Save icon on the Task Pane.</td><td></td></tr>
<tr><td colspan="2">Additional Modules Tab</td></tr>
<tr><td>17. It is not essential to update the Additional Modules tab at this time.</td><td>The Additional Modules tab allows you to add additional modules to MicroMD PM, such as Code Load, MicroMD CHC, Code Scrubbing and numerous imports and exports.</td></tr>
</table>

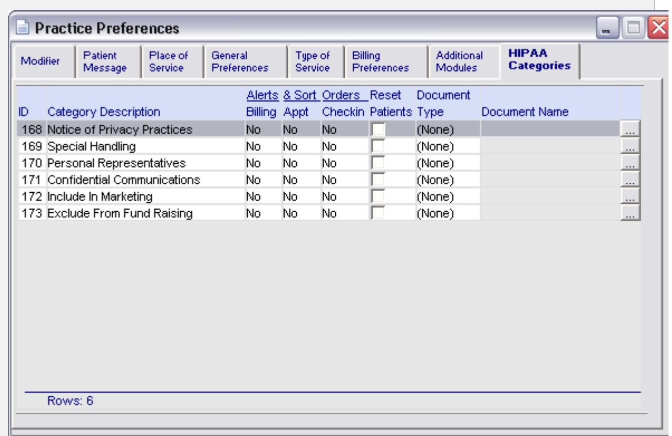
<table>
<tr><th colspan="2">HIPAA Categories Tab</th></tr>
<tr><td>

18. Click the **HIPAA Categories** tab.

</td><td>

The **HIPAA Categories** tab allows you to enable system-wide alerts that appear in the *Patient Detail* window. Drop-downs allow you to set the sort order of the alerts that appear for the user when they enter the patient in the *Billing*, *Appointment*, or *Check-In/Check-out* windows.

Administrators can clear all patients of any given category by using the *Reset Patients* checkbox.



</td></tr>
<tr><td>

19. Set all system-wide HIPAA alerts for this practice.

</td><td></td></tr>
<tr><td>

20. Click the **Save** icon on the Task Pane.

</td><td></td></tr>
</table>

STEP 13: ESTABLISH SECURITY SETTINGS

Using the Identity and Access Management Module, you create users and permissions for the practice's staff members. The practice can also customize their security settings to meet their needs.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>

1. Select **Setup** > **Identity and Access Management** > **Users and Groups** from the main menu.

</td><td>

This opens the *Users and Groups* window. This window contains a listing of all usernames and passwords for MicroMD PM. Only those with supervisor or equivalent security levels have access to this module.

Available security levels:

- Supervisor (unlimited access)
- Equivalent (access equal to supervisor, with exception that equivalents cannot access the Identity and Access Management Module)
- User (limited access determined by supervisor)

</td></tr>
</table>

Procedure	Details
2. Click the **New** icon to create new usernames and passwords.	
3. Click the **Permissions** tab to set user access to the system.	Supervisors can navigate through a tree of the system and select the specific modules to which a particular user may have access.
4. Click the **Save** icon on the Task Pane to commit your changes.	

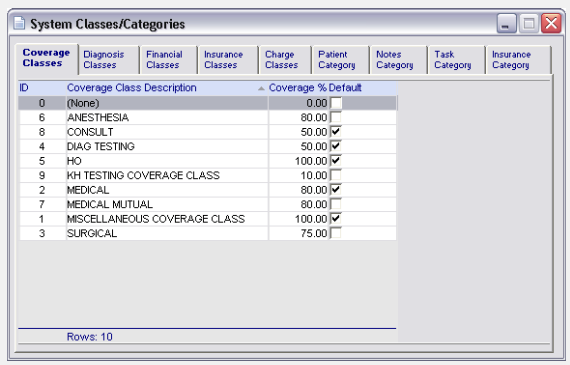
EXERCISE FOR MICROSYS MEDICAL

Create a user of your choosing and assign them a password.

STEP 14: SET UP SYSTEM CLASSES AND CATEGORIES

After finishing the practice preferences, the user must set up the system classes and categories. These items will be used in many of the maintenance features of the program.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Select Setup > System Classes/Categories from the main menu.</td><td>The System Classes/Categories window opens.


</td></tr>
<tr><td colspan="2">Coverage Classes Tab</td></tr>
<tr><td>2. Click the New icon on the Task Pane to create coverage classes for this practice. (The system already contains a Miscellaneous Coverage Class.)</td><td>The Coverage Classes tab contains a listing of the various coverage classes that can be used to group procedure codes.

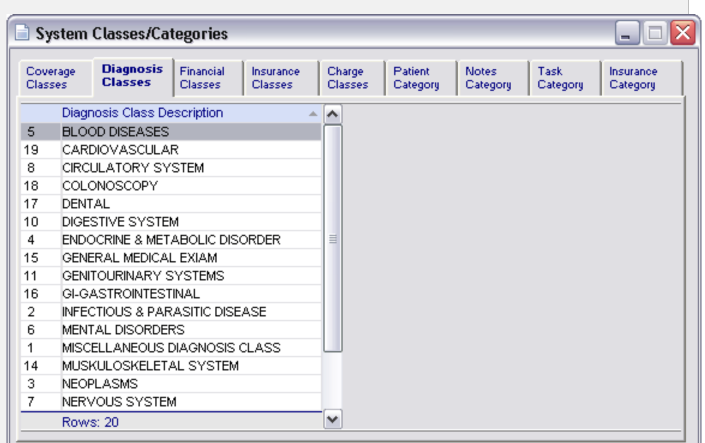
The coverage class must be assigned to the procedure code on the Procedure Detail window.

A coverage class can then be set up within each insurance plan to define the rate (Coverage %) it will pay on the allowed amount.</td></tr>
<tr><td>3. Type the Description of the coverage class.</td><td></td></tr>
<tr><td>4. Change the coverage percentage for this</td><td>The default percentage that appears at this point is</td></tr>
</table>

Procedure	Details
description.	*100%*. Change this as necessary.
5. Select the *Default* checkbox to add the coverage class to all newly created insurance plans.	
6. Repeat steps 2 through 5 for each additional class.	
7. Click the **Save** icon on the Task Pane.	The system assigns a unique ID number to each class.

EXERCISE FOR MICROSYS MEDICAL

Add a coverage class called Medical at 80%.

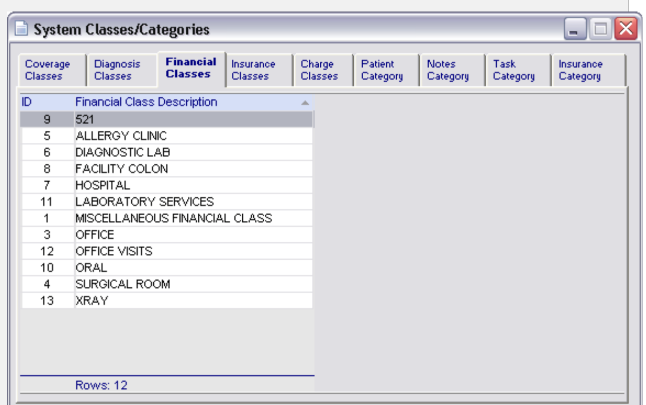
Procedure	Details
Diagnosis Classes Tab	
8. Click the **Diagnosis Classes** tab.	You must create these classes. Practices use the diagnosis classes in this tab to categorize the *Diagnosis List* (**Maint** > **Diagnosis**) further. When creating new diagnosis codes, the default class on the *Diagnosis Detail* window is initially *Miscellaneous Diagnosis Class*. Change this default on the **System Preferences** tab of the *System Preferences* window. 
9. Click the **New** icon on the Task Pane to create a new diagnosis class.	The system already contains a *Miscellaneous Diagnosis Class*.
10. Enter the *Diagnosis Class Description*.	
11. Repeat steps 9 and 10 for each additional class.	
12. Click the **Save** icon on the Task Pane.	The system assigns an ID number to this class.

hhhhhh

EXERCISE FOR MICROSYS MEDICAL

Create the following Diagnosis Classes:

Neoplasms
Blood Diseases

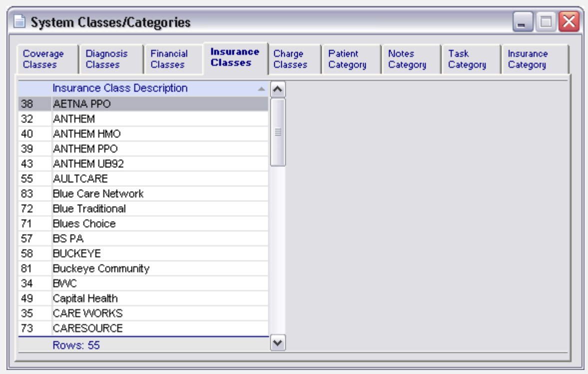
Procedure	Details
Financial Classes Tab	
13. Click the **Financial Classes** tab.	By establishing financial classes, the user can keep track of how much money is generated by performing specific services. Financial classes provide a way to group similar procedure codes together. When creating new procedure codes, the default financial class on the *Procedure Detail* window is initially *Miscellaneous Financial Class*. Change this default on the **System Preferences** tab of the *System Preferences* window. 
14. Click the **New** icon on the Task Pane to create a new Financial Class.	The system already contains a *MISCELLANEOUS FINANCIAL CLASS*.
15. Enter the *Financial Class Description*.	
16. Repeat steps 14 and 15 for each additional class.	
17. Click the **Save** icon on the Task Pane.	The system assigns an ID number to this class.

EXERCISE FOR MICROSYS MEDICAL

Create the following Financial Classes:

Office Visits

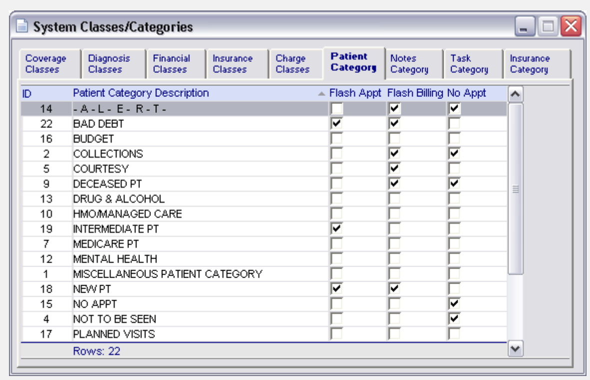
Laboratory Services

Procedure	Details
Insurance Classes Tab	
18. Click the **Insurance Classes** tab.	 This tab contains a listing of all the insurance classes created to group related insurance plans for reporting purposes and, in some cases, for assigning insurance-related IDs to a practice and its providers. We recommend that users create insurance classes specific for the major insurance plans in the system or for those that assign special provider numbers. For example, an insurance class of ABC Medical may encompass all ABC-related insurance plans. When creating new insurance plans, the default insurance class on the *Plan Detail* window is initially *Miscellaneous Insurance Class*. Change this default on the **System Preferences** tab of the *System Preferences* window.
19. Click the **New** icon on the Task Pane to add an insurance class.	
20. Enter the *Insurance Class Description*.	
21. Click the **Save** icon on the Task Pane.	The system assigns an ID number to this class.
22. Repeat steps 19 through 21 for each additional class.	**STOP |** If the user assigns the wrong insurance class to a plan, claims will be denied since the systems pulls information, like provider numbers, when printing or batching claims based partly on insurance classes.

EXERCISE FOR MICROSYS MEDICAL

Create the following Insurance Classes:

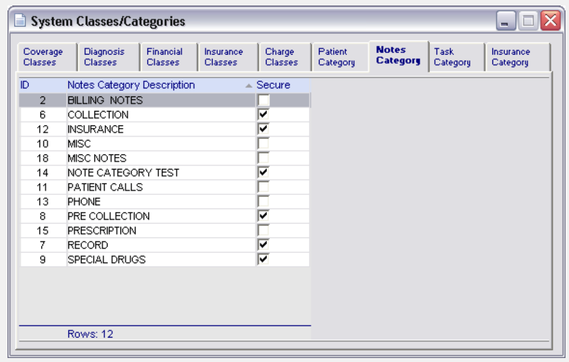
Medicare
Blue Shield
Medicaid

Procedure	Details
Charge Classes Tab	
23. It is not essential to make any changes to the **Charge Classes** tab at this time.	The **Charge Classes** tab contains a listing of all the charge classes. The purpose of a charge class is to have the ability to assign different fees to the same procedure, accommodating the various practices within the system. For instance, if a system contains two practices (ABC Family Practice and XYZ Physicians Group) who charge different prices for the same procedure, the user could create charge classes for each, indicating different fees. The user needs to make sure to assign a charge class to each practice and then assign the desired fee to that charge class on the **Charges** tab of the *Procedure Detail* window.
Patient Category Tab	
24. It is not essential to make any changes to the **Patient Category** tab at this time.	 The **Patient Category** tab contains a listing of all the various patient categories established in the system. These categories can be used to group patients for reporting purposes. The *Flash* checkboxes allow you to flash the category in the *Appointment* and *Billing* windows. A check in the *No Appt* box prevents users from creating an appointment for a patient associated with the

Procedure	Details
	category.

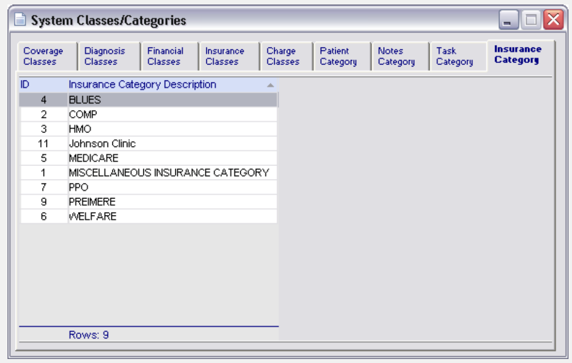
EXERCISE FOR MICROSYS MEDICAL

Create the following Patient Category: Courtesy Patient

Procedure	Details
Notes Category Tab	
25. Click the **Notes Category** tab.	 This tab contains a listing of all the note categories established in the system. The system automatically creates the *Miscellaneous Notes Category*. These note categories help tag any patient notes.
26. Click the **New** icon on the Task Pane to create a new note category.	
27. Enter a *Notes Category Description*.	
28. Select the *Secure* checkbox to make any note with this category editable by only the supervisor and the user who created the note.	
29. Repeat steps 26 through 28 for each category.	
30. Click the **Save** icon on the Task Pane.	The system assigns an ID number to the category.

EXERCISE FOR MICROSYS MEDICAL

Create the following Note Category: Collection

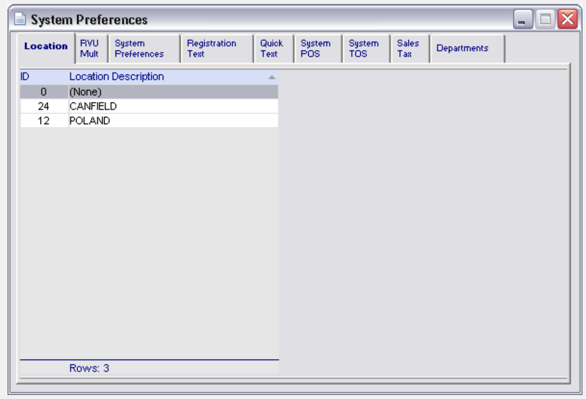
Procedure	Details
Task Category Tab	
31. It is not essential to make any changes to the **Task Category** tab at this time.	This tab lists the categories for items in Task Management.
Insurance Category Tab	
32. Click the **Insurance Category** tab.	 The **Insurance Category** tab lists the insurance categories created by the system, used to group insurance plans together that might not be in the same insurance class. MicroMD PM uses these categories for reporting. The *Miscellaneous* category already exists in the system.
33. Click the **New** icon on the Task Pane.	
34. Enter the *Insurance Category.*	
35. Repeat steps 33 and 34 for each category.	
36. Click the **Save** icon.	The system assigns an ID number to the category.

EXERCISE FOR MICROSYS MEDICAL

Create the following Insurance Category: HMO

STEP 15: SET UP SYSTEM PREFERENCES

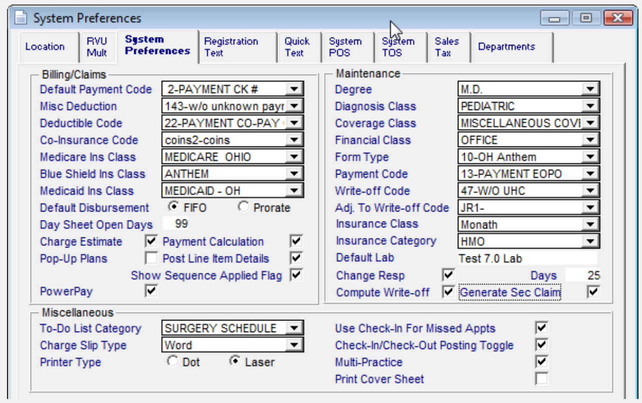
Once the system classes have been created, the next step is to set up the system preferences.

Procedure	Details
1. Select **Setup** > **System Preferences** from the main menu.	The *System Preferences* window opens. 
Location Tab	
2. Click the **New** icon on the Task Pane to create locations associated with the practice.	These locations represent the physical locations where the practice provides services, such as different offices for a practice. **NOTE |** MicroMD PM considers hospitals, nursing homes, etc. as service facilities and not locations. We strongly recommend that practices enter at least one location into the system.
3. Enter the *Location Description*.	
4. Repeat steps 2 and 3 for each location, if necessary.	
5. Click the **Save** icon on the Task Pane.	The system assigns an ID number to the location.

EXERCISE FOR MICROSYS MEDICAL

Create the following Location IDs: Boardman, Canfield

Procedure	Details
RVU Multiplier Tab	
6. It is not essential to make any changes to the **RVU Multiplier** tab at this time.	The **RVU Multiplier** tab allows the user to define RVU (Relative Value Unit) multipliers and assign them a multiplier value. The multiplier works in conjunction with the RVU to help

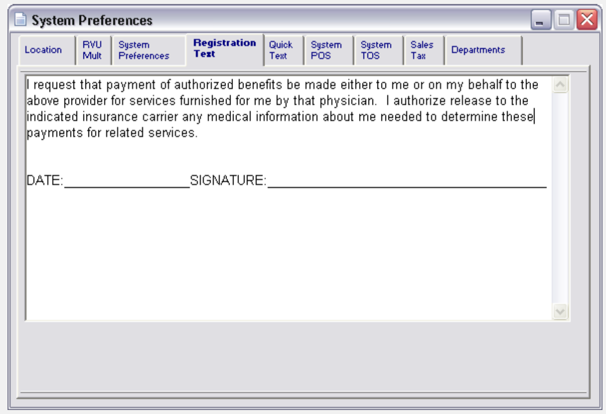
<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td></td><td>practices determine fees for their services. Each procedure in the system can be assigned an RVU multiplier from the list defined in this tab. MicroMD PM can run the Provider Work Productivity Report based on these values.</td></tr>
<tr><td colspan="2">System Preferences Tab</td></tr>
<tr><td>7. Click on the System Preferences tab.</td><td>

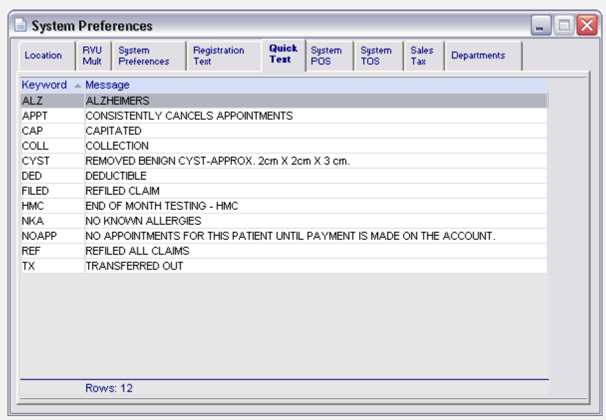
This tab allows the user to set the default values for most of the various drop-down lists, checkboxes, and radio buttons used throughout the program. The selections made in this tab affect the indicated areas in the program. For instance, the Payment Code and Write-off Code selected here appear as the default when entering plans in the system (Maint > Plan).

The Misc Deduction field is blank on a new system. MicroMD PM uses this default in the green Payment Calculation - Primary Insurance Plan window when posting.

If the user wants to let the system disburse payments automatically, you can set the default method by choosing FIFO or ProRate as the Default Disbursement.

If the client decides to skip pre-collection, be sure to check the Collection Without Letter checkbox.</td></tr>
<tr><td>8. Set the defaults.</td><td></td></tr>
<tr><td>9. Click the Save icon on the Task Pane.</td><td></td></tr>
<tr><td colspan="2">Registration Text Tab</td></tr>
</table>

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>10. Click the Registration Text tab.</td><td>

This tab contains the optional registration text that patients sign when filling out all the new patient paperwork. This text appears at the bottom of the patient registration form, which users can print from the Patient Detail window. </td></tr>
<tr><td>11. Change default text as necessary.</td><td>The text displayed in the figure is the default text. The user can change this text, if necessary.</td></tr>
<tr><td>12. Click the Save icon on the Task Pane.</td><td></td></tr>
<tr><td colspan="2">Quick Text Tab</td></tr>
<tr><td>13. Click the Quick Text tab.</td><td>

This tab allows the practice to create “Quick Text” macros and the associated sentences. This is very useful if users find themselves typing the same thing repeatedly.
The quick text is available in any note field, and in other fields, throughout the program. </td></tr>
<tr><td>14. Click the New icon on the Task Pane to create Quick Text entries.</td><td></td></tr>
<tr><td>15. Enter the Keyword and the Message that appears when users choose that keyword.</td><td></td></tr>
</table>

Procedure	Details
16. Click the **Save** icon on the Task Pane.	
17. Repeat steps 14 through 16 for each Quick Text entry.	

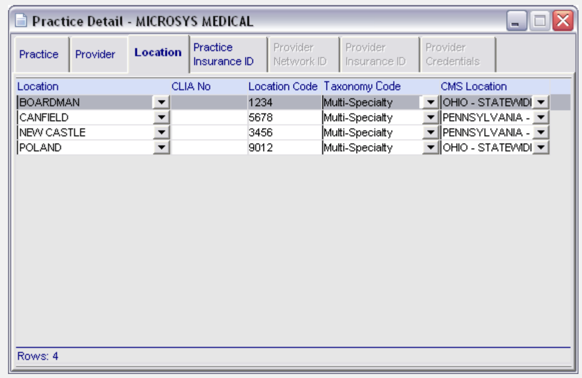
EXERCISE FOR MICROSYS MEDICAL

Create the following Quick Text: NKA – No Known Allergies

Procedure	Details
System POS Tab	
18. It is not essential to make any changes to the **System POS** tab at this time.	This tab contains a list of the CMS-approved place of service codes. The user may add to this list, if needed. MicroMD PM uses this list to modify the POS list for a specific practice found in the *Practice Preferences* window.
System TOS Tab	
19. It is not essential to make any changes to the **System TOS** tab at this time.	This tab contains a list of the CMS-approved type of service codes. The user can add to this list, if needed. MicroMD PM uses this list to modify the TOS list for a specific practice found in the *Practice Preferences* window.
Sales Tax Tab	
20. It is not essential to make any changes to the **Sales Tax** tab at this time.	This tab lists the rate of sales tax. To use sales tax, the user must first create a procedure/charge code for the tax (for example, the code "Tax"). Each location can have its own sales tax. Each sales tax can have effective dates. If the tax applies to a specific procedure code, be sure to check the *Taxable* checkbox on the procedure's detail window to post the tax automatically.
Departments Tab	
21. It is not essential to make any changes to the **Departments** tab at this time.	This tab allows practices to create and maintain a list of department descriptions for reporting purposes only. You can associate departments to a provider on the provider's detail window.

STEP 16: ADD THE LOCATION(S) TO THE PRACTICE(S)

After creating the location(s) in the system, you must associate those locations with a specific practice.

Procedure	Details
1. Select **Maint** > **Practice** from the main menu.	The *Practice List* appears.
2. Double-click the practice.	The *Practice Detail* window opens.
3. Select the **Location** tab.	
4. Click the **New** icon on the Task Pane to associate a location with this practice.	
5. From the drop-down list, select the *Location* for this practice.	We recommend assigning a location to a practice even if there is only one physical location associated with the practice.
6. Add the *Clia No* if different for each location.	The other fields are not essential at this time.
7. Repeat steps 4 through 6 for each additional location.	
8. Click the **Save** icon on the Task Pane.	

STOP | Once you have associated the location(s) with your practice(s), remember to go back to **Setup** > **Practice Preferences** > **General Preferences** tab and set your default *Location ID*.

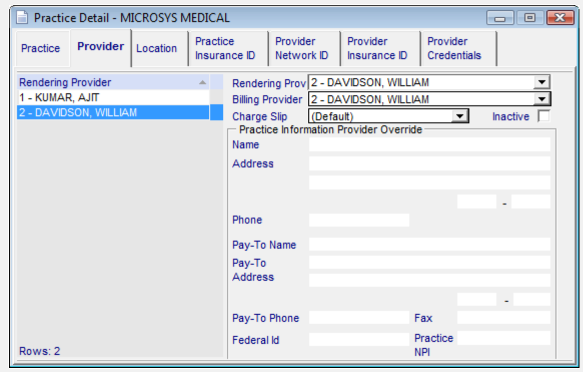
EXERCISE FOR MICROSYS MEDICAL

Add the location IDs that you created in Step 15 to this practice. Leave the *CLIA No* and *Location Code* columns blank.

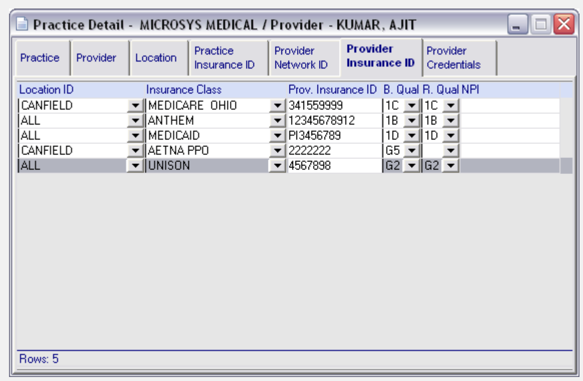
STEP 17: ADD INDIVIDUAL PROVIDER IDS

Once you assign locations to the practices, you must add individual provider numbers.

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Select Maint > Practice from the main menu.</td><td>The Practice Detail window opens.</td></tr>
<tr><td>2. Click the Provider tab.</td><td>



</td></tr>
<tr><td>3. Highlight the appropriate provider.</td><td>This action enables the Provider Network ID and Provider Insurance ID tabs.</td></tr>
<tr><td>4. Click the Provider Insurance ID tab.</td><td>



This tab allows the user to enter provider IDs assigned by the various insurance plans for printing on the claim form.

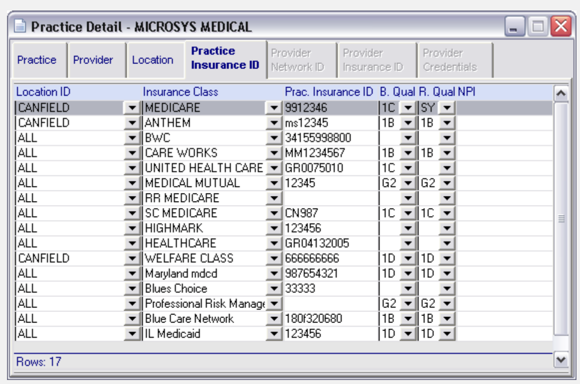
Users must make an entry on this tab when an insurance plan assigns the provider an ID. In order for this provider ID to print on the claim form, the Insurance Class on this tab must match the Insurance Class on the Plan Detail window for the insurance plan assigning the ID.

</td></tr>
<tr><td>5. Click the New icon on the Task Pane to enter each new ID.</td><td></td></tr>
</table>

Procedure	Details
6. From the *Location ID* drop-down list, select the location for this provider insurance ID.	If the *Provider Insurance ID* or *NPI* applies to all the locations, select *ALL*. There may be different provider numbers assigned based on location. It may be necessary to create a row for each location to accommodate the IDs assigned.
7. Select the *Insurance Class* assigning this ID.	
8. Enter the *Prov. Insurance ID* and/or *NPI*.	
9. Select any required qualifiers from the *B. Qual* or *R. Qual* drop-downs.	These qualifiers identify the type of number used for the provider's ID.
10. Repeat steps 5 through 9 for each additional *Provider Insurance No*.	
11. Click the **Save** icon on the Task Pane.	

STEP 18: ADD GROUP IDS

After adding the individual provider numbers, you must add the group numbers.

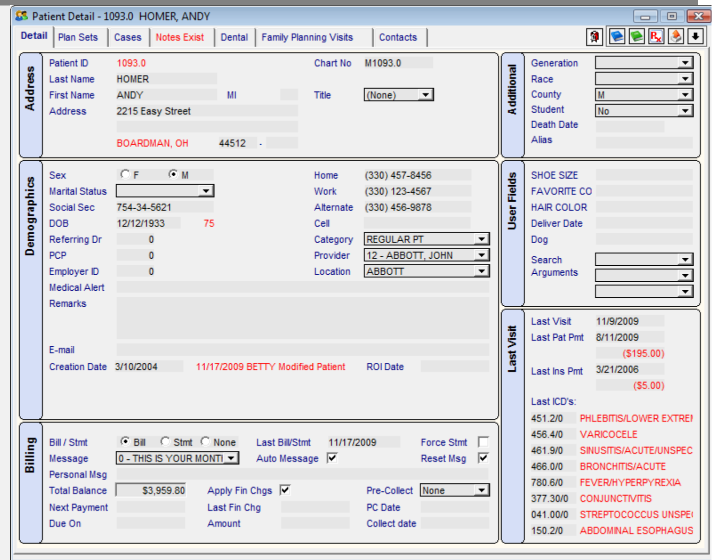
Procedure	Details
1. Select **Maint** > **Practice** from the main menu.	The *Practice List* window opens.
2. Double-click the appropriate practice.	The *Practice Detail* window opens.
3. Click the **Practice Insurance ID** tab.	 This tab allows the user to enter the IDs assigned to the practice by the various insurance plans for printing on the claim form. In order for this group ID to print on the claim form, the *Insurance Class* on this tab must match the *Insurance Class* on the *Plan Detail* window for the insurance plan assigning the ID.

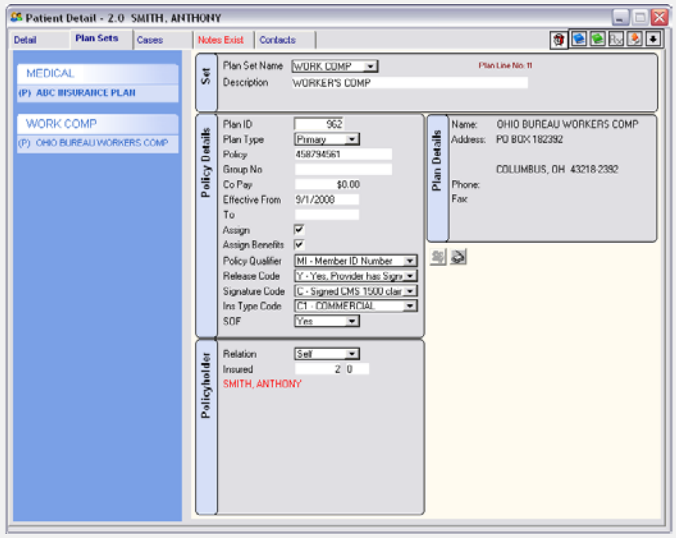
Procedure	Details
4. Click the **New** icon on the Task Pane to enter each ID.	
5. From the *Location ID* drop-down list, select the location for this practice insurance ID.	If the *Practice Insurance ID* applies to all the locations, select *ALL*. There may be different IDs assigned based on location. It may be necessary to create a row for each location to accommodate the IDs assigned.
6. Select the *Insurance Class* assigning this ID.	
7. Enter the *Practice Insurance ID* and/or *NPI*.	
8. Select any required qualifiers from the *B. Qual* or *R. Qual* drop-downs.	These qualifiers identify the type of number used for the provider's ID.
9. Repeat steps 4 through 8 for each additional Practice Insurance ID.	
10. Click the **Save** icon on the Task Pane.	

STEP 19: ADD PATIENTS AND ASSOCIATE PLANS

Once the insurance plans have been created, these plans should be assigned to the appropriate patients. To do that, we must first add patients.

Procedure	Details
Add Patients	
1. Select **Maint** > **Patient** from the main menu.	The *Guarantor/Patient List* window opens.
2. Click the **New** icon on the Task Pane to create a new patient account (or press the **Ctrl N** key combination as a shortcut).	A blank *Patient Detail* window opens. This example has some data so you can understand the fields better.

Procedure	Details
	
3. Enter all information into the patient's detail.	**NOTE |** *The Medical Alerts* and Remarks fields print on charge slips, and the *Personal Msg* field prints on the patient's bill or statement.
4. Click the **Save** icon on the Task Pane.	
Add Plans	
5. Select the **Plan Sets** tab.	This tab allows you to specify patient's insurance information for billing purposes. The system allows unlimited insurance plans for each patient. These plans could be a combination of primary, secondary, and tertiary insurance. You can group insurance plans for a patient into "sets," which then can be used for different cases. Each plan set can include several plans. Grouping insurance plans into sets allows each patient to have more than one primary insurance plan.

Procedure	Details
	For example, you can create a *MEDICAL* plan set to include all medical plans. Then you can create a *WORK COMP* plan set to include the plan(s) used for the worker's comp cases for this patient. 
6. Enter the *Plan ID* for this patient's plan.	You can also use this field to search for the plan.
7. Complete all necessary information for this carrier.	
8. Click the **Save** icon on the Task Pane and exit out of the window.	
9. Repeat steps 2 through 8 for each additional patient.	Once the patients have been added to the system, the basic setup is complete. If the practice wants to send claims electronically, proceed to *Chapter 2 EB Setup* for instruction on setting up electronic billing.

EXERCISE FOR MICROSYS MEDICAL

Add the patients on the following pages to the Microsys Medical database.

Patient Registration

Microsys Medical

790 Boardman-Canfield Road

Youngstown, OH 44511

Section I: **Patient Information** **Date**_______________

Last Name: Smith First: Anthony MI: J

Address: 424 Main Street

City: Youngstown State: OH Zip: 44514

Home Phone: (330) 726-9877 Work Phone: (330) 758-3345

Social Security Number: 528-75-9957 Date of Birth: 12/15/1936 [X] M [ ] F

Check Appropriate Box: [ ] Single [ ] Married [X] Widowed [ ] Separated [ ] Divorced

Employer: ______________________________

Provider: Dr. Ajit Kumar

Allergies (Medical Alerts): None

Who referred you? Dr. William Davidson

Section II **Responsible Party**

(If patient is responsible, please put SAME on Last Name line.)

Last Name: Anderson First: Ellen MI:_____

Address: 424 Main Street

City: Youngstown State: OH Zip: 44514

Home Phone: (330) 726-9877

Section III **Emergency Contact Info**

Last Name: Anderson First: Ellen MI:_____

Address: 424 Main Street

City: Youngstown State: OH Zip: 44514

Home Phone: (_330_) _726-9877_________________ Relationship: Daughter________________

Patient Registration – Page 2

Section IV Insurance Information

Primary

Name of Insured: Anthony J Smith_______DOB: ______________ Relationship to Patient: _Self________________

Insured Address: ________________________City: __________________State: ______Zip: _________________

Insurance Company: __Palmetto GBA __________Policy#: 528759957A______ Group#: ____________________

RC528759957_________Ins Co. Phone: ____

Ins Co Address: PO Box 57_____City: _Columbus____________ State: OH__ Zip: 43217_____

Name of Employer: ________Retired___________________ Work Phone: (____)________________

Address of Employer: _____________________City: __________________ State: ________Zip: ___________

Secondary

Name of Insured: Self_____________________ DOB: ______________ Relationship to Patient: ____________

Insured Address: ________________________City: __________________State: ______Zip: __________

Insurance Company: _BCBS _________________ Policy #: _YRP554M5656__ Group#: 36415

Ins Co. Phone: _2165.544.5689_____

Ins Co Address: _PO Box 6018_________________ City: _Cleveland_ State: _OH_ Zip: 44101__

Name of Employer: _________________________________ Work Phone: (____)________________

Address of Employer: ________________________City: __________________ State: ________Zip: ___________

Patient Registration

Microsys Medical

790 Boardman-Canfield Road

Youngstown, OH 44511

Section I: **Patient Information** **Date**______________

Last Name: Buckner____________________________ First: Joanna____________________________ MI: M___

Address: 5121 Riverview Manor ____

City: Boardman____________________________________State: OH_______ Zip: 44512_________

Home Phone: (330) 726-8996_______________ Work Phone: (___) n/a ____________________________

Social Security Number: 479-97-8264_________ Date of Birth: 05/08/1971___________ ☐ M ☒ F

Check Appropriate Box: ☐ Single ☒ Married ☐ Widowed ☐ Separated ☐ Divorced

Employer:____

Provider: Dr. Ajit Kumar____

Allergies (Medical Alerts): None ____

Who referred you? _Dr. Carl Rubino____

Section II **Responsible Party**

(If patient is responsible, please put SAME on Last Name line.)

Last Name: SAME___________________________ First:_______________________________ MI: ____

Address: _________________________

City:____State:__________ Zip: ______________

Home Phone (_____)_________________________

Patient Registration – Page 2

Section III **Emergency Contact Info**

Last Name: Buckner First : James MI: D

Address:

City: State: Zip

Home Phone (330) 509-9784 Relationship: Husband

Section IV **Insurance Information**

Primary

Name of Insured: James D. Buckner DOB: 02/12/1965 Relationship to Patient: Spouse

Insured Address: 5121 Riverview Manor City: Boardman State: OH Zip: 44512

Insurance Company: BC/BS of Ohio Group #: 658 Copay: 20.00

Policy# YRC27685479602 Ins Co. Phone:

Ins Co Address: PO Box 6018 City: Cleveland State: OH Zip: 44101

Name of Employer: The Vindicator Work Phone: ( )

Address of Employer: City State: Zip

Secondary

Name of Insured DOB Relationship to Patient

Insured Address City State: Zip

Insurance Company: Group #: Policy#:

Ins Co. Phone:

Ins Co Address: City: State: Zip:

Name of Employer: Work Phone: ( )

Address of Employer: City: State: Zip:

Patient Registration

Microsys Medical

790 Boardman-Canfield Road

Youngstown, OH 44511

Section I: **Patient Information** **Date_______________**

Last Name: Bacon________________ First: Scott______________________________ MI:_M___

Address: 6320 South Oakland Ave____

City:__Boardman____State:_OH_______ Zip:__44512_________

Home Phone: (_330_)_726-3324________ Work Phone: (_800_) 980-5478________________________________

Social Security Number:_257-72-9292________ Date of Birth:_03/22/1977___________ ☒ M ☐ F

Check Appropriate Box: ☒ Single ☐ Married ☐ Widowed ☐ Separated ☐ Divorced

Employer: General Motors____

Provider: Dr. Kumar____

Allergies (Medical Alerts): Allergic to Eggs____

Who referred you? _Dr. Carl Rubino____

Section II **Responsible Party**

(If patient is responsible, please put SAME on Last Name line.)

Last Name: SAME__________________________________First:___________________________________ MI: ____

Address: ____

City:____State:__________ Zip: ______________

Home Phone (_____)_________________________

Patient Registration – Page 2

Section III **Emergency Contact Info**

Last Name: Bacon First : Pauline MI:_____

Address: 556 Western Ave

City: Boardman State: OH Zip: 44512

Home Phone (330) 758-1265 Relationship: Mother

Section IV **Insurance Information**

Primary

Name of Insured: Self DOB: ______________ Relationship to Patient: ________________

Insured Address: ________________________________City: __________________State: ______Zip: __________

Insurance Company: United Health Care Group #: __________________Copay: $30.00

Policy#: 25772929201 Ins Co. Phone:______________________________________

Ins Co Address: PO Box 2158 City: Pittsburgh State: PA Zip: 15230

Name of Employer: ____________________________________ Work Phone: (____)_______________

Address of Employer:________________________ City__________________ State:________ Zip ___________

Secondary

Name of Insured__________________________DOB_______________Relationship to Patient ________________

Insured Address__________________________________City______________State:________Zip ___________

Insurance Company:_________________________________ Group #: ________________________________

Policy#: __________________________________ Ins Co. Phone:_______________________________________

Ins Co Address: ______________________________ City: _____________________ State: _____ Zip: _______

Name of Employer: ____________________________________ Work Phone: (____)_______________

Address of Employer: ___________________________City: _____________ State: ________Zip: ___________

Patient Registration

Microsys Medical

790 Boardman-Canfield Road

Youngstown, OH 44511

Section I: **Patient Information** **Date_______________**

Last Name: Martin________________________ First: Barbara____________________________ MI: J___

Address: 521 Spearman Avenue____

City: Youngstown____State: OH___ Zip: 44503_________

Home Phone: (_330_) 758-8735_________ Work Phone: (_330_) 747-9857______________________

Social Security Number: 307-94-1020_________________ Date of Birth:_06/25/1956___________ ☐ M ☒ F

Check Appropriate Box: ☐ Single ☒ Married ☐ Widowed ☐ Separated ☐ Divorced

Employer: Retired from Henry Schein Medical Systems____________________________________

Provider: Dr. Ajit Kumar____

Allergies (Medical Alerts): Milk and Dairy Products____

Who referred you? _Dr. Samuel Kollar MD (NPI-5689725631)

____

Section II **Responsible Party**

(If patient is responsible, please put SAME on Last Name line.)

Last Name: SAME_______________________________ First:_________________________________ MI: ____

Address: ____

City:____State:__________ Zip: ______________

Home Phone (_____)_________________________

Patient Registration – Page 2

Section III Emergency Contact Info

Last Name: Martin First: Paul MI: R

Address: 521 Spearman Avenue

City: Boardman State: OH Zip: 44512

Home Phone (330) 747-9857 Relationship: Spouse

Section IV Insurance Information

Primary

Name of Insured: Paul R. Martin DOB: 07/25/1941 Relationship to Patient: Spouse

Insured Address: 5801 Cross Street City: Youngstown State: OH Zip: 44510

Insurance Company: United Health Care Group #: 5656

Policy#: 295808987 Ins Co. Phone:

Ins Co Address: PO Box 2158 City: Pittsburgh State: PA Zip: 15230

Name of Employer: General Motors Work Phone: ( )

Address of Employer: City: State: Zip:

Secondary

Name of Insured: Self DOB: Relationship to Patient:

Insured Address: City: State: Zip:

Insurance Company: Palmetto GBA Medicare Group #: MSP Type Code :Other Liability Insurance

Policy#: 307941020A Ins Co. Phone #

Ins Co Address: PO Box 57 City: Columbus State: OH Zip:43217

Name of Employer: Work Phone: ( )

Address of Employer: City: State: Zip:

EB SETUP

CHAPTER 2

This section describes the steps to be taken to set up electronic billing in MicroMD PM. The descriptions are an overview of what needs to be done and why it needs to be done at each step.

> **STOP |** The setup for electronic billing must be done on the machine with the modem. HyperACCESS must also be installed on this computer.

Refer to the *MicroMD PM User's Reference Manual* for a more detailed explanation of how to complete each step or for more information on the various fields involved.

STEP 1: SET UP FORM TYPES

The first step in setting up electronic billing is to set up form types. Refer to Chapter 1. Follow the instructions for the **Form Type** tab and the **Form Options** tab.

Electronic Billing specifications

Be sure to review the electronic billing specifications for Clearinghouses and Patient Statements. These specification documents are located in The Lounge at http://www.micromd.net/index.php?board=62.0.

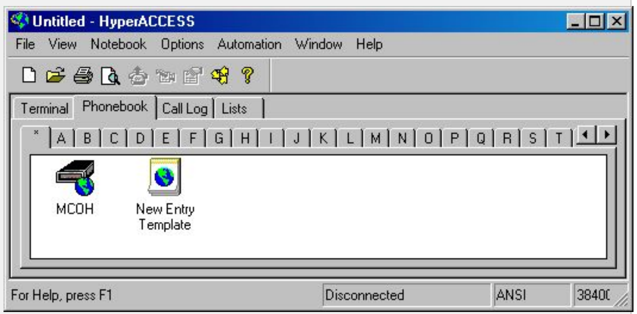
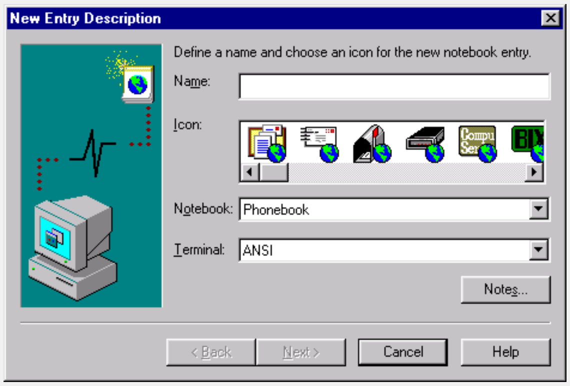
STEP 2: CONNECTION SETUP

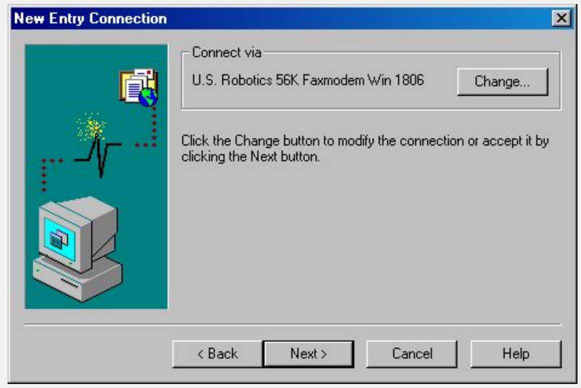
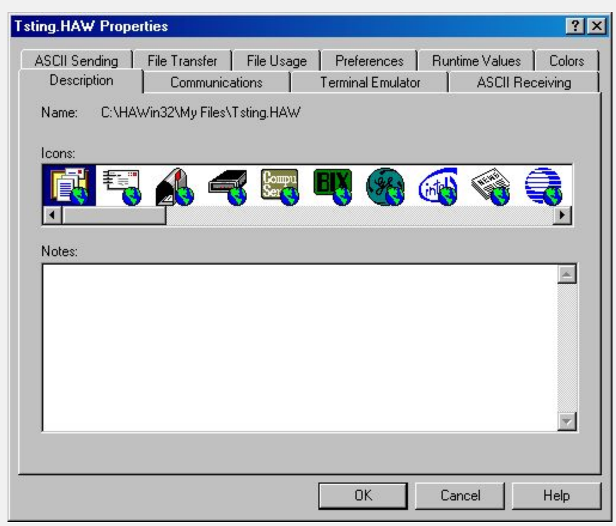
HyperACCESS Setup

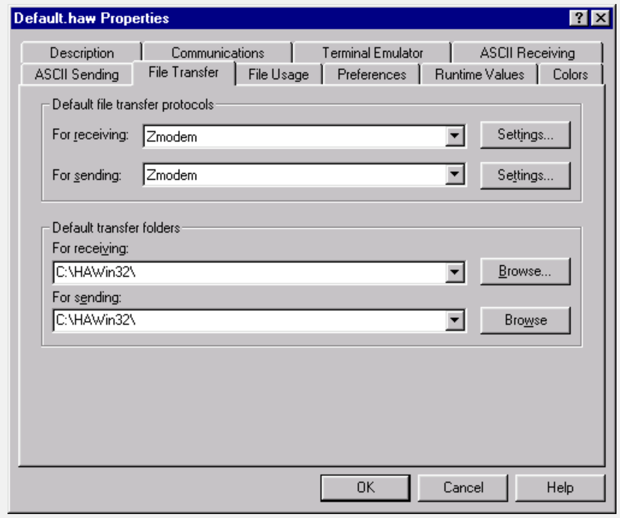
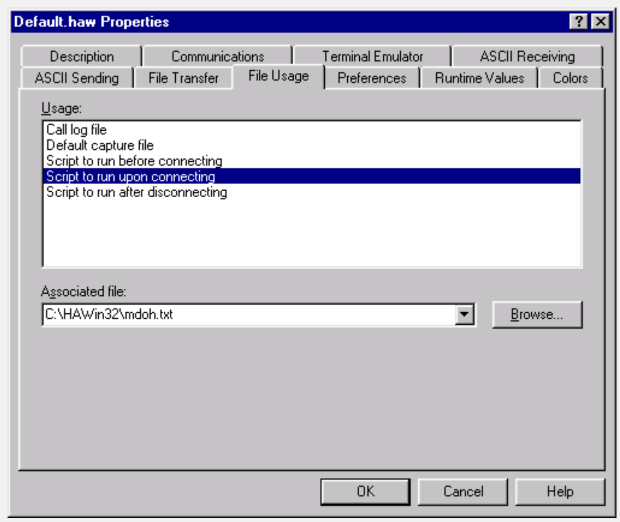
> **STOP |** HyperACCESS is used only for some locations with ExpressBill services. Verify if these steps are necessary.

You must create an icon within HyperACCESS for each electronic billing type the practice will process electronically. Use the following procedure to set up HyperACCESS.

> **STOP |** Find these values in the EB Setup Specs document for the carrier. This document is available on the reseller web site at www.micromd.com. (Be sure to login to the private site.)

Procedure	Details
1. Open HyperACCESS by selecting **Start** > **Programs** > **HyperACCESS**.	A *HyperACCESS* window opens. 
2. Click the **Phonebook** tab.	
3. Double-click the **New Entry Template** icon.	The *New Entry Description* window opens. 
4. Enter the *Name* for this entry.	Remember this name. You will use the same name for the HAW file on the *Electronic Billing Setup* window. **NOTE |** We recommend using the four-character name from the *EB Type* drop-down on the **Form Options** tab.
5. Select an appropriate icon.	
6. Leave the *Notebook* and *Terminal* fields as they are.	
7. Click **Next**.	

Procedure	Details
8. Leave the default modem setting. If the appropriate modem is NOT the one that appears by default, click **Change…**, highlight the desired modem, and click **OK**.	
9. Click **Next**.	
10. If you selected a dial-up connection, enter the phone number information.	Select **Dialing Properties** to specify if the modem must dial any phone characters to reach an outside line, to disable call waiting, or to choose a calling card for long distance numbers.
11. Click **Communications Settings…**	
12. Establish all calling preferences for this electronic billing type.	For example, the maximum speed for sending to ABC Company is 9600 bps.
13. Click **Next**.	This is all that HyperACCESS needs to create the icon for this electronic billing type.
14. Click **Finish**.	HyperACCESS returns you to the main window.
15. Right-click the newly created icon and select *Properties*.	The *.HAW file's *Properties* window opens. 

Procedure	Details
16. Click the **File Transfer** tab.	
17. Set the *Default file transfer protocols* to *Zmodem*.	**STOP |** Refer to the HyperACCESS instructions for the appropriate EB Type. There are times when the protocol will NOT be Zmodem. You can find these instructions on the Reseller Support Web Site. Visit www.micromd.com.
18. Set the *Default transfer folders* to the HAWin32 directory on the local drive (typically the *C:* drive.)	
19. Click the **File Usage** tab.	
20. If this claims processing type has a script to run, select *Script to run upon connecting* from the *Usage* field.	If the associated script calls for stored login/password values, then enter these values on the **Runtime Values** tab. Check www.micromd.com to verify if a script is needed for this claim type.

Procedure	Details
21. Select the filename and path for the script in the *Associated file* field.	Typically, the path is *C:\hawin32***filename**.
22. Click **OK**.	
23. Select **Options** > **Startup** from the main menu.	
24. Uncheck *Open last used notebook entry at startup* and click **OK**.	

FTP Setup

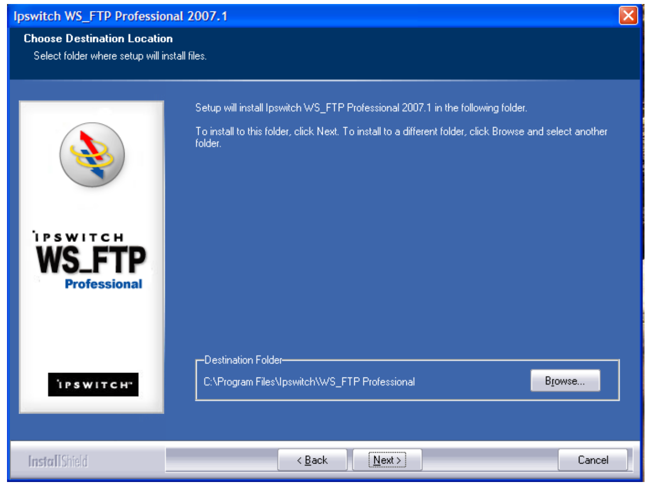
FTP (File Transfer Protocol) software is a transmission software that is compatible with Windows. Some clients may require an FTP program be installed instead of HyperACCESS. This is a third-party software. Installation directions follow:

Procedure	Details
1. Double-click the wsftp200710_Eng.exe icon. Click the **Next** button.	
2. Accept the licensee agreement and click the **Next** button.	

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>

3. Leave the default destination folder as is and click the **Next** button**.**

</td><td>



</td></tr>
<tr><td>

4. Leave the default Program Folder and Click **Next**.

</td><td>

</td></tr>
<tr><td>

5. Uncheck both Launch WS_FTP Pro and View Release Notes. Click the **Finish** button.

</td><td>

</td></tr>
<tr><td>

6. To add the serial number (obtained from Accounting), go to Start > Programs > Ipswitch WS_FTP Professional > Ipswitch

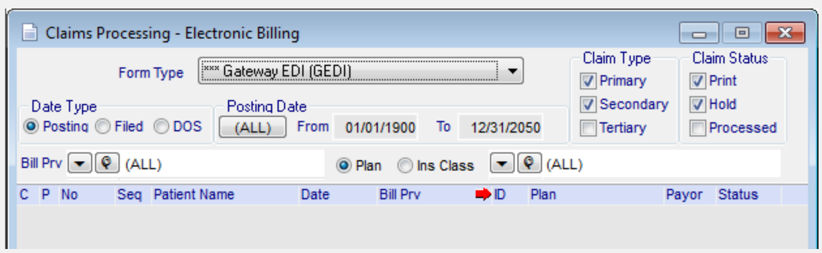
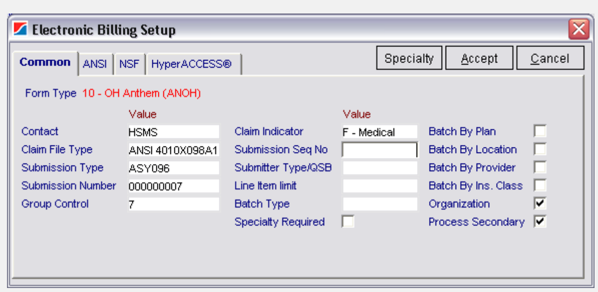
</td><td></td></tr>
</table>

Procedure	Details
WS_FTP Professional 2007, then click once to open the program.	
7. Click the **Cancel** button on the Connection Wizard, then click the **Close** button in the Tip of the Day.	
8. Select **Help** > **About**, then enter the serial number.	

STEP 3: CLAIMS PROCESSING SETUP

The next step in setting up electronic billing is to set up the claims processing information.

> **STOP** | The *EB Setup Specs* document is useful to set up the values on the *EB Setup* window. Access these documents from the web at www.micromd.com.

Procedure	Details
1. Select **Claims** > **Claims Processing - EB** from the main menu.	The *Claims Processing – Electronic Billing* window opens. 
2. Select the appropriate form type from the drop-down list.	
3. Click the **EB Setup** icon.	The *Electronic Billing Setup* window opens. 
4. Enter the appropriate information for this electronic billing type. Use the tabs to access the different sections of this window.	MicroMD PM will update the *eb.ini* file with the information entered into the HyperACCESS fields. If these fields are left blank, MicroMD PM updates them from the *eb.ini* when users send claims electronically for the first time. MicroMD PM prompts the user for the name of the **.haw* file on the first transaction unless user manually edits the *eb.ini* file.

Procedure	Details
	The *Path* field on the **HyperACCESS** tab points to the medical directory or to the designated folder where the client wants to place the claim file. Typically, those values are: *f:\medical* for a dedicated server system *c:\medical* for a non-dedicated server system
5. Click **Accept**.	
6. Repeat steps 2 through 5 for each form type.	

MORE ABOUT THE EB.INI FILE

> **NOTE** | For more information about the *eb.ini* file and the different ways you can use this file, please refer to Appendix B.

What is an .INI file?

INI is a file name extension used in Microsoft® Windows®. The letters stand for "initialization." As this term implies, INI files are used to initialize, or set parameters for, certain programs.

Format of .INI Files

INI files contain one or more sections. Each section begins with a section name, which is followed by zero or more entries. An entry associates a keyname with a value. The general format is:

```
[section]
keyname=value
```

Comments can also be included in the file by prefacing the comment with a semicolon (`;`).

eb.ini File

The *eb.ini* file resides on the server in the *medical* directory where the *medical.db* also resides. Each database will have its own *eb.ini*. There are three different types of sections in the *eb.ini*:

- HYPERACCESS Section

  This section tells MicroMD PM where to find the HyperACCESS path, and where to find the executable to open HyperACCESS.

  Example:

  ```
  [HYPERACCESS]
  path=c:\hawin32\
  exe=c:\hawin32\hawin32.exe
  ```

- ARCHIVE Section

This section tells MicroMD PM how long to keep the archived claim files and reports in the system. It also tells MicroMD PM where to store them.

Example:

```
[ARCHIVE]
days=30
path=\\Server Name\MicroMD\archive\
```

eb.ini Setup

You must update the *eb.ini* file to include an entry for each electronic billing type. You can update this file from any workstation throughout the network. Each entry must include the following lines:

```
[(4-character file designator)(practice number)]
haw=filename
```

MicroMD PM uses the four-character file designator to name the file created by the program to transmit to the electronic billing carrier. The practice number is a number, starting at one, that increments for each practice for that particular client.

For example, the following is the entry for Practice Insight for the first practice in the system:

```
[PRIN1]
haw=PRIN.haw
```

As mentioned previously, if the HyperACCESS section on the *Electronic Billing Setup* window is complete, MicroMD PM updates the *eb.ini* file with the information from these fields. If those fields are left blank, MicroMD PM updates the HyperACCESS section from the *eb.ini* when users send claims electronically for the first time.

If this information is not entered in either the *eb.ini* file or MicroMD PM, the user is prompted by HyperACCESS for information when sending claims electronically for the first time to that carrier. The information entered here will automatically update the *eb.ini* file.

CONFIGURING ADD-ONS

CHAPTER 3

MicroMD works with many different software vendors and partners to bring you the most effective tools to run your practice. Since these tools work in conjunction with the MicroMD EMR and PM products, there may be some set-up required for each add-on. In this section we will cover all of the add-ons for MicroMD, complete with pertinent information on key coding, set-up instructions, and guidance on acquiring support for each one.

ESERVICES

The following are all eServices that work with MicroMD PM.

AutoRemind (MicroMD PM)

AutoRemind is an automatic reminder service that allows a practice to deliver appointment and other types of reminders via phone call, email or text message.

Available in Version: 8.5.4 or higher

Key Code: Required

The key code (generated by MicroMD Accounting) is sent to MicroMD Client Support (or the VAR) for configuration of AutoRemind for existing customers. If the customer is new, the configuration of AutoRemind is handled by MicroMD Training staff or the VAR.

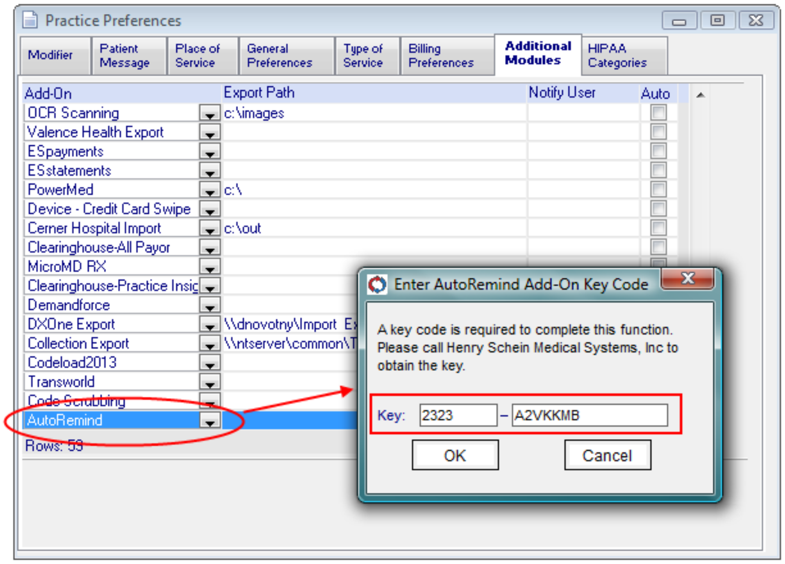
Support

Users requiring support should contact AutoRemind Support at support@autoremind.com.

Additional Configuration Instructions

The configuration of a client to use AutoRemind is outlined below

Procedure	Details
1. Install MicroMD PM 8.5.4 or higher.	See the MicroMD Installation Manual.
2. MicroMD Accounting receives the order for AutoRemind and generates the key code.	**NOTE |** Key code is provided to MicroMD Client Support or VAR for existing customers, or MicroMD Training Staff or VAR for new customers. When a key code is sent to a VAR, it is sent with the exact client name and client number that is in the MicroMD Office Package.
3. Enter the key code on the **Additional Modules** tab of the *Practice Preferences* window.	Once the AutoRemind module has been added, MicroMD will prompt you for a key code. The first section of the key code field is for the practice key. The practice key can be found in the MicroMD Office Package. The second section is reserved for the key code itself. See the screen shot below



a. Select AutoRemind from the drop-down menu.

b. When you click the Save link in the Practice Preferences task pane, you will be prompted with the pop-up window shown below, requiring the customer number (first box) and the key code (second box).

c. Enter the required information into the window and click the OK button.

The configuration of a client to use AutoRemind is outlined below (cont'd)

Procedure	Details
4. Ping the web service to ensure the service is running.	

In the link below, replace everything in braces ({}) with actual values, then remove the braces. The values for each parameter can be found in the MicroMD Connection Manager.

After replacing the parameters with actual values, copy and paste the entire string into a browser and run.

http://localhost:9053{or IP:port}/{PhysicaldbName}/wsDataAction.aspx?XMLData=<root><Application ApplicationName="AutoRemind" PracticeName="{practice name}"/><DataAction action="AppointmentList" /><parameters start="2010-09-17" end="2020-09-18" modified="ALL" modified_date="2001-09-16" appointment_id="" offset="" size="100" /><database database_name="{virtualdbName}"/></root>

If no errors occur, a blank page will be displayed. Right-click and select “View Source” to review the data and confirm that the test was successful.

> **NOTE |** The practice name in the PM must match the name in the MicroMD Office Package (if MicroMD is conducting the configuration). If a VAR is conducting the configuration, the practice name and number will be provided by MicroMD Accounting.

Procedure	Details
5. Transfer the web service URL and the SQL Server admin username and password to AutoRemind.	Send this information to support@autoremind.us.
6. AutoRemind takes it from here to manage client set-up, training and support.	Configuration is complete.

Demandforce (MicroMD PM)

Demandforce is an automatic reminder and reputation management service that allows a practice to deliver appointment and other types of reminders via phone call, email or text message.

Available in Version: 7.6.4 or greater (build date 7/2/12 or greater) or Version 6.5 (build date 7/2/12 or greater)

Key Code: Required

The practice key code is generated in MicroMD accounting when the client first becomes a client, and this is the key code used for this type of order. However, the code will be automatically in place, and it is not used by support or accounting for registration purposes.

Support: Users requiring support should contact Demandforce at support@demandforce.com.

Additional Configuration Instructions

Depending on which version of MicroMD PM you are using, you will find a specified set of instructions below.

Setup Notes (MicroMD PM Version 6.5)

> **NOTE |** Practices using Demandforce with MicroMD Version 6.5 must have Microsoft .NET 4.0 Framework installed.

For setup with MicroMD PM Version 6.5, complete the following steps:

Procedure	Details
1. Open the MicroMD PM software.	
2. Select **Setup** > **Practice Preference**.	The *Practice Preferences* window opens.
3. Click the **Additional Modules** tab.	
4. Click the **New** icon on the Task Pane.	
5. Select Demandforce from the *Add-On* drop-down list.	
6. In the *Export Path* column, enter the path where the Demandforce XML file will be stored.	**NOTE |** This path needs to be located on the database. For this path, you may want to create a Demandforce child folder inside the *Medical* folder.
7. Click the **Save** icon in the Task Pane.	The system prompts you for a security code when you attempt to save. Contact Henry Schein Medical Systems to obtain this key code.
Demandforce Configuration for Version 6.5	

Procedure	Details
7. Click the **Setup** icon in the Task Pane.	The *Additional Modules Configuration – Demandforce* window opens.
8. In the *Username* and *Password* fields enter the proper values provided by Demandforce.	
9. Leave the *D3 Transfer Utility* field blank.	
10. In the *MicroMD Utility* field, browse to the location where the database is located.	
11. In the *License Key* field, enter the proper value provided by Demandforce.	
12. In the *Transaction Days* field enter the amount of previous days the system with gather financial information for.	
13. In the *1st Transfer* and *2nd Transfer* fields, enter the times when the XML files will be created and sent to Demandforce.	
14. Click the **Finish** button.	
15. Click the **Save** icon on the Task Pane.	

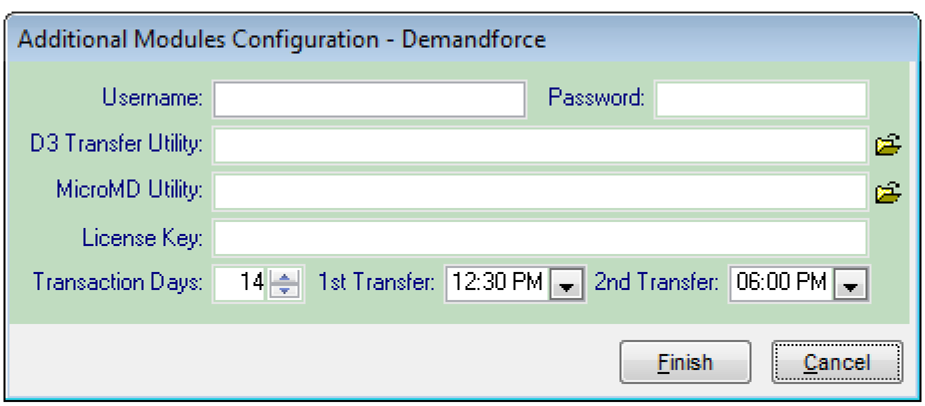


Figure 3.1 Additional Modules Configuration window for Version 6.5

Setup Notes (MicroMD PM Version 7.6.4 and Above)

For setup with MicroMD PM Version 6.5, complete the following steps:

Procedure	Details
1. Open the MicroMD PM software.	

2. Select **Setup** > **Practice Preference**.	The *Practice Preferences* window opens.
3. Click the **Additional Modules** tab.	
4. Click the **New** icon on the Task Pane.	
5. Select Demandforce from the *Add-On* drop-down list.	
6. In the *Export Path* column, enter the path where the Demandforce XML file will be stored.	**NOTE |** For this path, you may want to create a Demandforce child folder inside the *Medical* folder.
7. Click the **Save** icon on the Task Pane.	The system prompts you for a security code when you attempt to save. Contact Henry Schein Medical Systems to obtain this key code.
Demandforce Configuration for Version 7.6.4 and above	
8. Click the **Setup** icon in the Task Pane.	The *Additional Modules Configuration – Demandforce* window opens.
9. In the *Username* and *Password* fields enter the proper Demandforce values.	
10. Leave the In the *D3 Transfer Utility* field blank.	
11. In the *Computer Name* field, enter the name of the computer that is running CliniGration.	
12. In the *License Key* field, enter the proper value provided by Demandforce.	
13. In the *Transaction Days* field enter the amount of previous days the system with gather financial information for.	
14. In the *1st Transfer* and *2nd Transfer* fields, enter the times when the XML files will be created and sent to Demandforce.	
15. Click the **Finish** button.	
16. Click the **Save** icon on the Task Pane.	

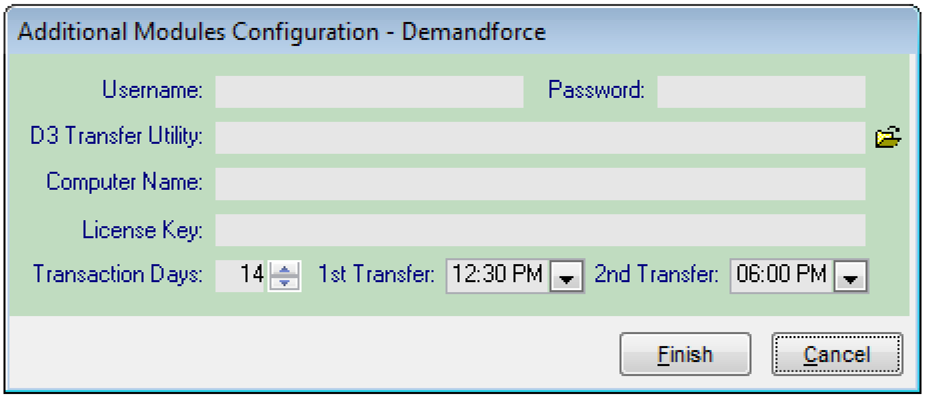


Figure 3.2 Additional Modules Configuration window for Version 7.6.4 and above

eBackUp (MicroMD PM)

eBackUp is an online backup solution that eliminates the risks of tape or CD backup and secures the safety of your sensitive data.

Available in Version: 7.7 or greater or Version 6.5 (build date 7/2/12 or greater)

Key Code:

Support: Users requiring support should contact

Additional Configuration Instructions

Depending on which version of MicroMD PM you are using, you will find a specified set of instructions below.

eStatements (MicroMD PM)

eStatements allows patients to receive statements from providers via email through the Client Patient Portal.

Available in Version: 8.1.6 or greater

Key Code: A key code is generated in the MicroMD Office Package when the order is placed. See the instructions below for the proper location of the key code.

Support: Users requiring support should contact Henry Schein MicroMD at HSMS.support@henryschein.com

Additional Configuration Instructions: Depending on which version of MicroMD PM you are using, you will find a specified set of instructions below.

This document contains specifications for registering a practice and configuring the system for use with MicroMD eStatements and online portals.

> **NOTE |** HSMS personnel receive a welcome email from Moneris upon completion of a sale. This email includes data used to complete the Additional Modules setup in the system.

After the accounting department has created an order for eStatements, you must complete the following steps:

- Add the ESstatement additional modules in MicroMD PM
- Revise the eb.ini file for proper transfer of e-statements
- Enroll the practice in the MicroMD eStatement Client Enrollment Portal and create a test file
- Add users to the MicroMD eStatement View Portal

> **STOP |** Before continuing with eStatements, please take a moment to review the prerequisites section below. Several items must be in place before using these additional features of MicroMD PM.

Prerequisites

In order to use certain eServices with MicroMD PM, several security measures need to be in place. These security measures are the responsibility of the client and should be performed by your IT vendor. Your IT vendor will be able to assist you with these items. For further assistance in configuring SSL, please see *Chapter 19* of the *MicroMD Installation Manual.*

- **A registered domain name** – Each practice using specific eServices (those requiring SSL) from Henry Schein Medical Systems will need to have a registered domain name. For example, *www.MyPracticeName.com*, where "MyPracticeName" is the name of the practice.
- **A static IP address** – In most cases, this will be an upgrade from a dynamic IP address.
- **An SSL Certificate** – In order to ensure secure transactions, an SSL (Secure Socket Layer) certificate must be in place. This prevents any loss or sharing of private data from possible cyber criminals, and assures a smooth transaction.

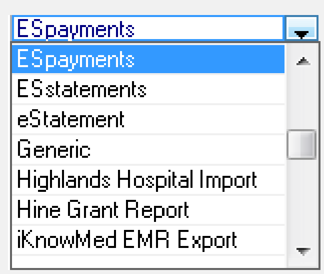
Procedure Codes for Online Statement Transactions

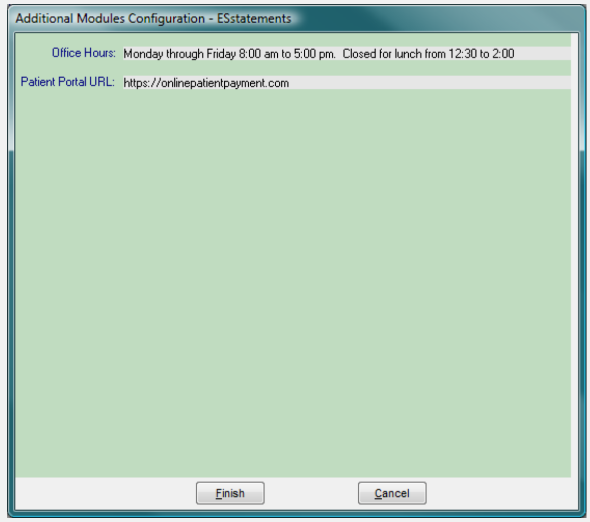
Before setting up the eStatements module, you must add new procedure codes needed for proper transactions within the system. You need to create a code for payments AND as separate code for reimbursed payments. To create a new procedure code:

Procedure	Details
1. Select **Maint** > **Procedure** from the main menu.	You can also click the Procedure button ( ) on the launch pane. The Procedure List window appears.
2. Click the **New** icon on the Task Pane. To add a new charge code.	A blank *Procedure Detail* window opens.
3. Enter the proper information for the new procedure.	NOTE | In the *TOS* field, select the entry with the "PD" prefix. Also, verify that the *Co-Pay* checkbox is selected. STOP | If you want this code available only to a specific practice, you MUST specify it now. Once the code is saved, this field is disabled and cannot be changed again.
4. Click the Save icon on the Task Pane.	

Add the esStatements Additional Module

To set up MicroMD eStatements for use with MicroMD PM, complete the following steps:

Procedure	Details
1. Open the MicroMD PM software.	
2. Select **Setup** > **Practice Preference**.	The *Practice Preferences* window opens.
3. Click the **Additional Modules** tab.	
4. Click the **New** icon on the Task Pane.	
5. Select *ESStatements* from the *Add-On* drop-down list.	

Procedure	Details
6. Click the **Setup** icon in the Task Pane.	The *Additional Modules Configuration – ESstatements* window opens. 
7. In the *Office Hours* field, enter the text you want to appear in the printed statement that patients will receive.	
8. In the *Patient Portal URL* field, enter: https://onlinepatientpayment.com	This is the webpage that patients visit to make payments through the Online Patient Payment Portal.
9. Click the **Finish** button.	
10. Click the **Save** icon on the Task Pane.	After you click the Save icon, you will be prompted to enter the security code to complete the enrollment.

Revise the eb.ini File

Before you set up MicroMD eStatements module or send test files, you must edit the eb.ini initialization file:

`[Estatement1]`

`path=\\micromdsrv4\micromd\stmt`

Where **`path`** is the path to the

database.`days=30[estatement]`

`internet=AUTO`

`httpAddress=https://rx.micromd.comm/RevSpring/RevSpring.svc`

> NOTE | In the above example, `\\micromdsrv4\micromd\stmt` is the file path to the database. Your file path will differ. Also note that a folder called "stmt" must be added to the database.

> NOTE | Remember to remove all other "[estatement]" values from the eb.ini so the system can send files properly.

Set Up the Practice in the MicroMD eStatement Client Enrollment Portal

Once the accounting department creates an order for MicroMD eStatements, support personnel will enroll the practice in the eStatement Client Enrollment Portal. Follow these steps to log in to the portal:

> NOTE | While completing the Enrollment process, it is important to remember the differences between the **Save** button and the **Next** button.
>
> At any time during the completion of the various screens, if you would like to save your information, click the **Save** button. This will not advance you to the next screen, and nothing in the form is saved until you click the **Save** button.
>
> The **Next** button will advance you to the next screen but will not save your work.

Procedure	Details
1. Open a web browser and go to the following site:https://webservice.pscinfogroup.com/enrollmicromd/login.aspx User Name: `micromd` Password: `fancy123`	

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>2. Once you successfully log in, click the Enrollment link at the top of the page.</td><td>
</td></tr>
<tr><td>2. Click New Enrollment.</td><td>
</td></tr>
<tr><td>3. Enter the practice key located in the Office Package for the client, then click the Submit button.</td><td>
</td></tr>
<tr><td>5. Click the Henry Schein Rep link on the menu located on the left side of the screen. The HSMS team member you select on this screen will receive confirmation emails once test files are sent.

NOTE | This will most likely be a standard HSMS email address.</td><td>
</td></tr>
</table>

Procedure	Details
6. Complete the practice information form. This information will appear on patient statements. NOTE | If you need to gather more information and complete the form later, remember to click the **Save** button at the bottom of the screen.	
7. Click the **Next** button.	
8. Enter the type of statement in the *Product Type* drop-down, and add any notes in the *Special Requests* or *Notes* field.	Note whether the data is test data or live data.
9. Click the **Next** button to open the Attachments screen	

Adding Attachments

The eStatement client Enrollment Portal includes links to the Postal Acknowledgement (PAF) and Move Update Compliance (MUC) forms at the bottom of the Attachment screen ( ). You can attach those files—along with a practice logo—by browsing to them on your machine and clicking the **Attach** button for each.

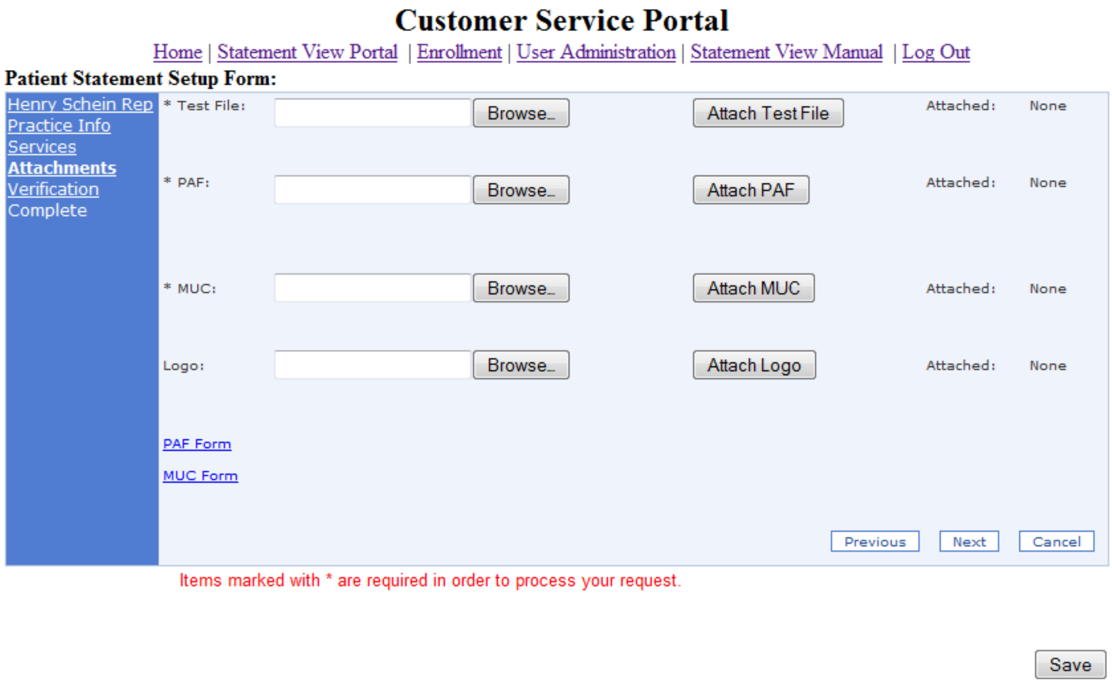


Figure 3.3 Attachment Section of the eStatement Client Enrollment Portal

Procedure	Details
1. Click the **Attachments** link in the navigation pane in the upper-left corner.	The *Attachments* window opens, as shown above.
2. Click the **Browse** button and locate the item you wish to attach.	Browse...
2. Once you have located the item you wish to attach, click the **Attach** button that corresponds to the file you are attaching (Test File, PAF, MUC or Logo).	Attach Test File OR Attach PAF OR Attach MUC OR Attach Logo
3. Once the proper **Attach** button has been clicked, the name of the attachment will appear in the "Attached" column to the right.	Attached: hs_logo.png
5. Click the **Next** button to advance to the next section of the enrollment, or click the **Save** button to save your changes first.	NOTE | The test file will follow the format of `dd_xxxx.txt` where dd is the current date and xxxx is the four-digit practice key code.

Creating Test Files

You must attach a test eStatement file to complete the practice registration. Creating an eStatements is no different from compiling normal statements from the Billing Options window in MicroMD PM (select **Billing** > **Statements/ Bills** from the main menu).

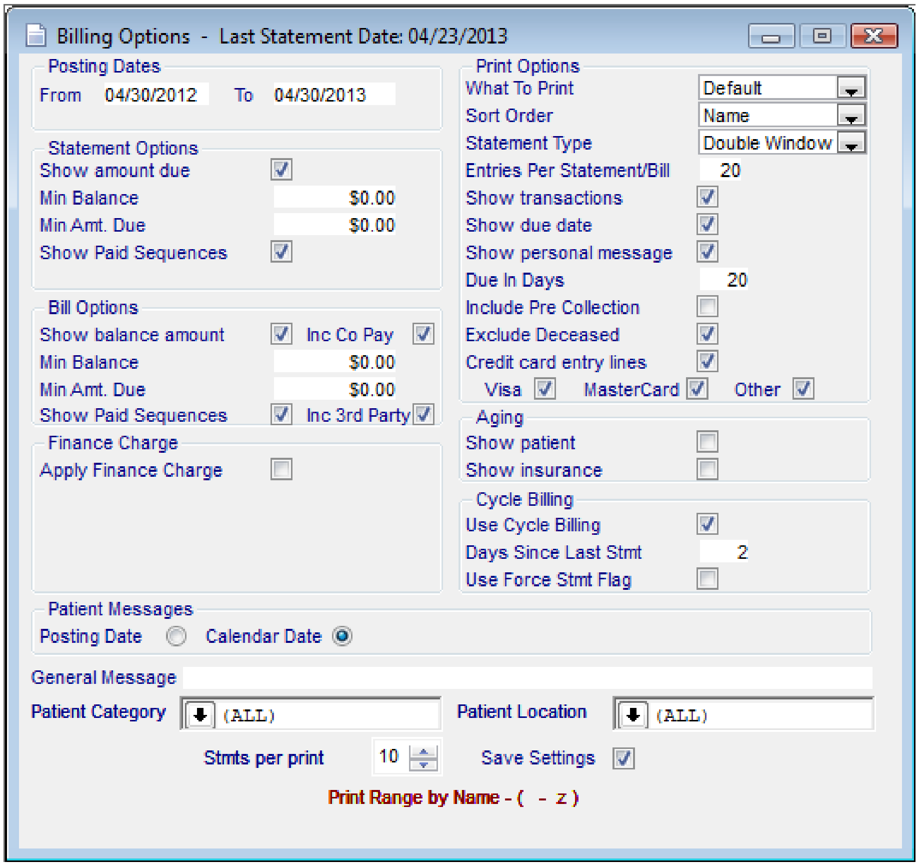


Figure 3.4 The Billing Options Window

> **STOP |** On the Billing Options window, verify that you select eStatement V4 in the Statement Type field.

> **NOTE |** If you need additional in-depth information about sending statements from within MicroMD PM, please refer to the most recent version of the MicroMD PM User's Reference Manual.

When you are done compiling the statements on the Billing Options window and click the **Print** icon on the Task Pane, the system creates the stmt.txt file in the location designated in the Estatement1 section of the eb.ini file (refer to the **Revise the eb.ini file** section). This stmt.txt file must be included in the Attachment section of the MicroMD eStatement Client Enrollment Portal.

Set Up a Patient in the MicroMD eStatement Client Enrollment Portal

Enrolling a patient to use the Patient Portal for receiving statements via email can be done in the Demographics section of the Patient Detail window of MicroMD PM. You can follow these steps on your own, however, MicroMD Support will walk you through the procedure when eStatements is being set up.

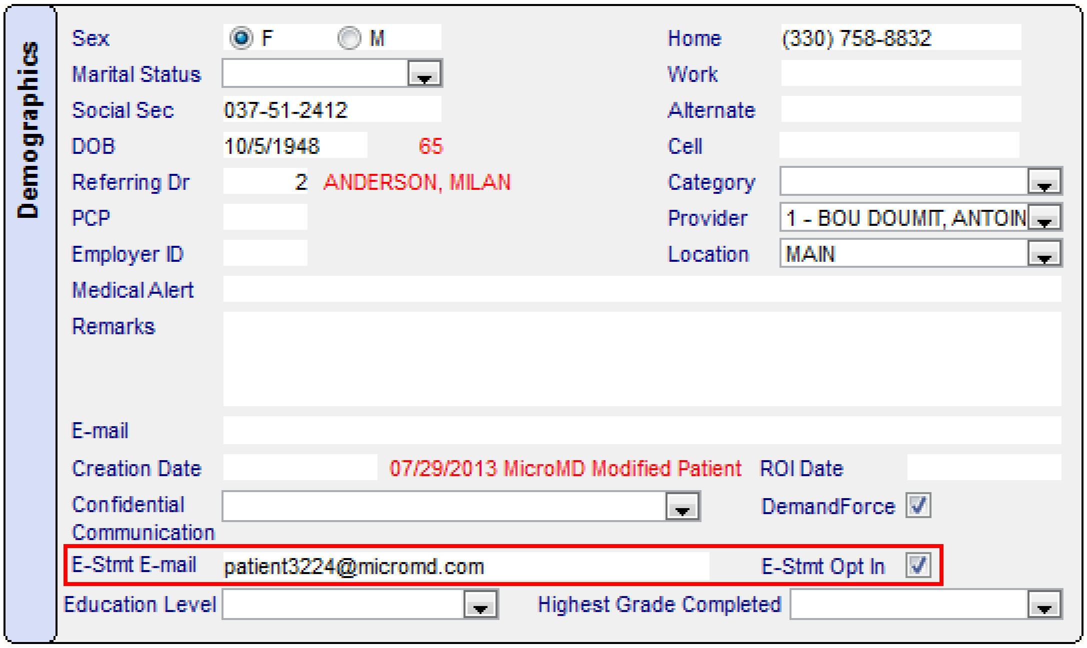


Figure 3.5 eStatement Opt-in Section

In order to enroll a patient to receive eStatements via email they need to opt in and provide their email address (shown above). If the patient is also being set-up for ePayments, the practice needs to gather the patient's date of birth, Social Security number and zip code in order for the patient to make payments online.

Sending eStatement files

It is not necessary to send a stmt.txt file electronically to complete the practice registration.

But when the practice is completely registered and ready to send production files electronically, users only need to click the Send File icon on the Task Pane once the stmt.txt file has been created. The system displays a Success dialog box if it is sent correctly from the MicroMD PM software.

> **NOTE |** The Success message means that the file has been sent to the HSMS Aggregator. It does not mean the file has been received by RevSpring. That may take up to two days.

Verification and Completion

After you add the test file and Attachments to the eStatement Client Enrollment Portal, click **Next** or click the **Verification** link on the menu on the left side of the screen. Review the saved information for the practice and click the **Finish** button to complete the enrollment.

> **NOTE |** A confirmation email will be sent when the enrollment is complete. If no confirmation email is received, the enrollment is still pending. The email will most likely be sent from HSMS.

An approval form will be sent to MicroMD from RevSpring. MicroMD sends the form to the client for completion, and the client sends it back to us to return to RevSpring. Also included from the client is one initialed test statement.

The enrollment of eStatements is now complete.

ePayments (MicroMD PM)

eStatements allows patients to receive statements from providers via email through the Client Patient Portal.

Available in Version: 8.1.6 or greater

Key Code:

Support: Users requiring support should contact Henry Schein MicroMD at HSMS.support@henryschein.com

Additional Configuration Instructions: Depending on which version of MicroMD PM you are using, you will find a specified set of instructions below.

This document contains specifications for registering a practice and configuring the system for use with MicroMD ePayments and online portals.

> **NOTE |** HSMS personnel receive a welcome email from Moneris upon completion of a sale. This email includes data used to complete the Additional Modules setup in the system.

After the accounting department has created an order for eStatements, you must complete the following steps:

- Add the ESpayments additional module in MicroMD PM
- Revise the eb.ini file for proper transfer of e-statements
- Enroll the practice in the MicroMD eStatement Client Enrollment Portal and create a test file
- Add users to the MicroMD eStatement View Portal

> **STOP |** Before continuing with ePayments and eStatements, please take a moment to review the prerequisites section below. Several items must be in place before using these additional features of MicroMD PM.

Kick-off Call

A kick-off call will be scheduled between MicroMD (support and IT staff) and the client (and a member of the client's IT staff). The purpose of the call will be to schedule some time for both IT departments to work together to establish the secure SSL connection.

Prerequisites

In order to use certain eServices with MicroMD PM, several security measures need to be in place. These security measures are the responsibility of the client and should be performed by your IT vendor. Your IT vendor will be able to assist you with these items. For further assistance in configuring SSL, please see *Chapter 19* of the *MicroMD Installation Manual*, or follow the steps in the section below.

- **A registered domain name** – Each practice using specific eServices (those requiring SSL) from Henry Schein Medical Systems will need to have a registered domain name. For example, *www.MyPracticeName.com*, where "MyPracticeName" is the name of the practice.
- **A static IP address** – In most cases, this will be an upgrade from a dynamic IP address.

- **An SSL Certificate** – In order to ensure secure transactions, an SSL (Secure Socket Layer) certificate must be in place. This prevents any loss or sharing of private data from possible cyber criminals, and assures a smooth transaction.

MicroMD SSL Web Services Setup

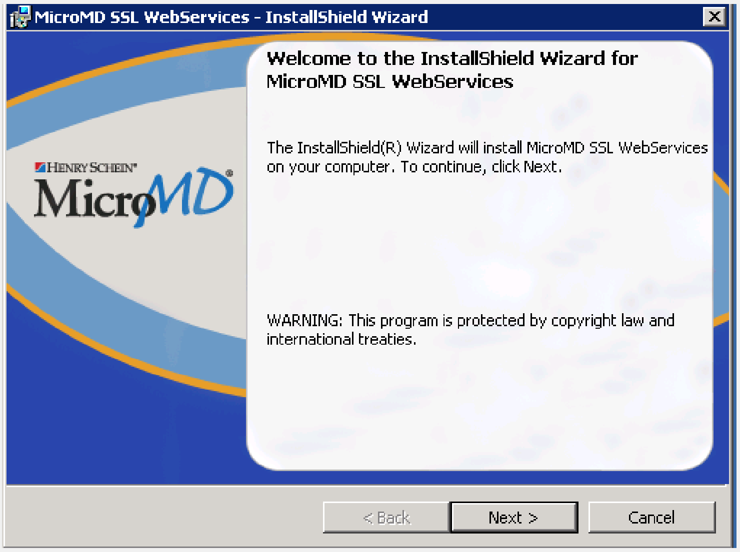
The following instructions are straight from the MicroMD Installation Manual. Use this to set up the MicroMD SSL Web services.

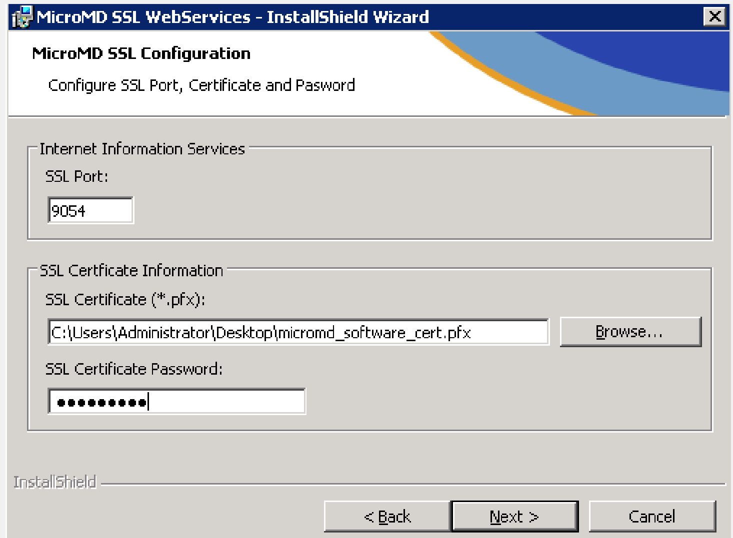
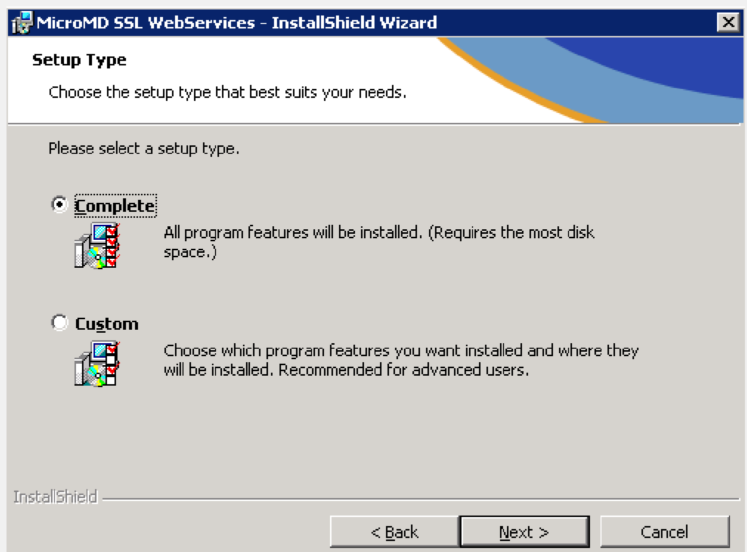
Requirements

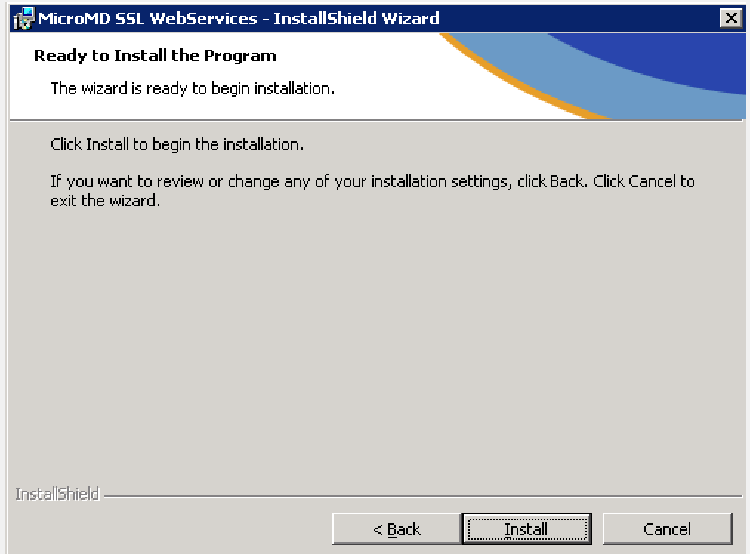
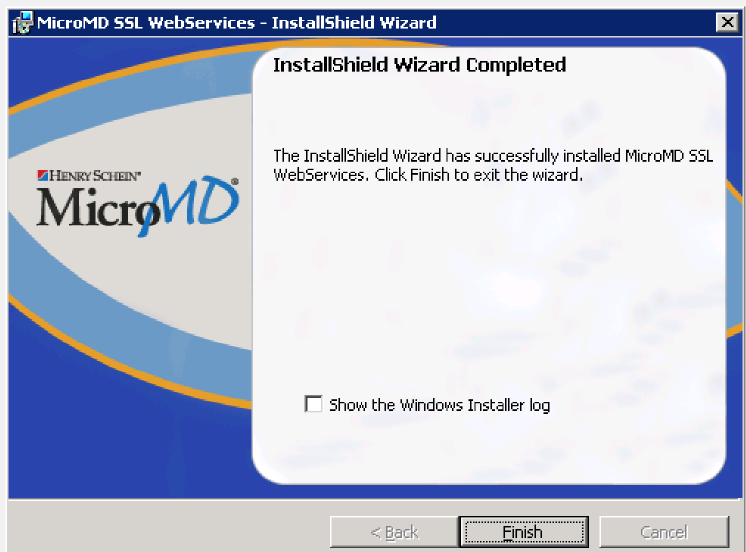
In order to use any of the MicroMD SSL Web Services, the following requirements must be met:

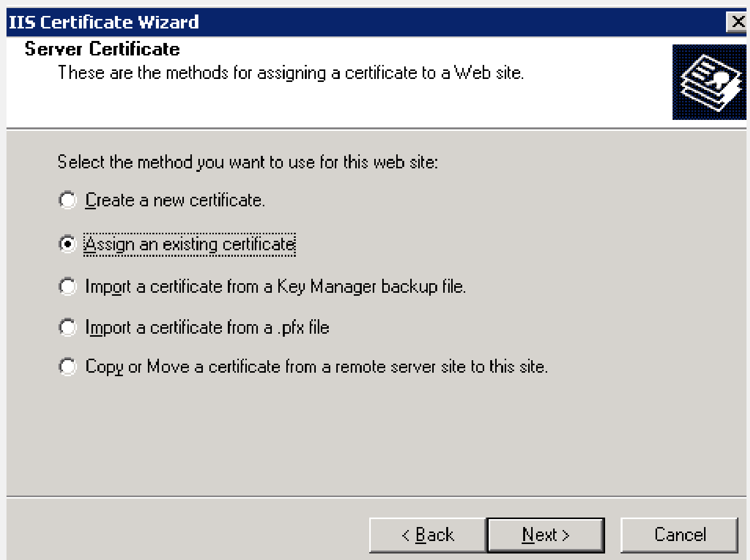
- Static IP Address
- Purchase a Domain Name associated with Static IP Address
- Purchase an SSL Certificate registered to Domain Name
- SSL Port specified during MicroMD SSL WebServices install will need to be allowed through client's firewall.

Installing MicroMD SSL WebServices

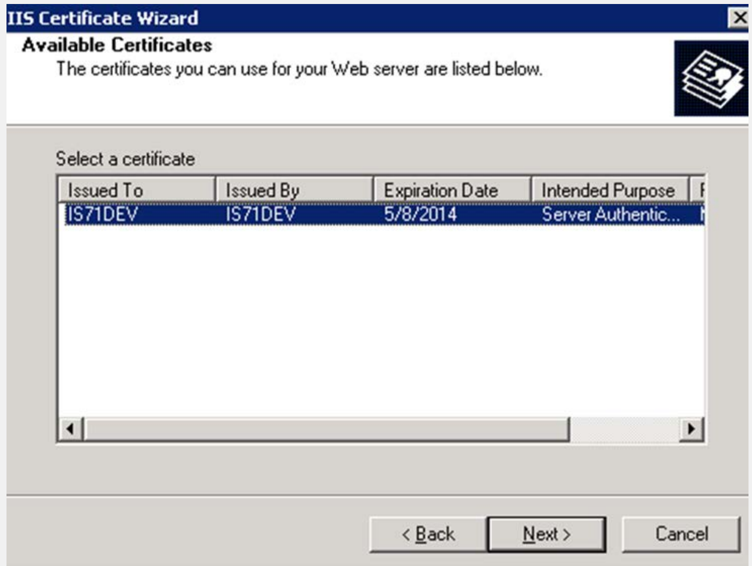
Procedure	Details
1. Click **Next** at the welcome screen.	
2. Specify SSL Port: 9054 is default.	
3. Specify SSL Certificate: .pfx file only.	
4. Specify SSL Password.	

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>5. Click Next.</td><td>
</td></tr>
<tr><td>6. Make sure the Complete radio button is selected for the setup type.</td><td></td></tr>
<tr><td>7. Click Next.</td><td>
</td></tr>
</table>

Procedure	Details
8. Click the **Install** button.	
9. Click the **Finish** button.	
Additional Steps for Installing IIS 6	
10. Open Internet Information Services (IIS) 6.	Select **Start** > **Control Panel** > **Administrative Tools** > **Internet Information Services (IIS) Manager**.
11. Expand Web sites.	
12. Right-click on **MicroMD Secure** and select **Properties**.	
13. Click the **Directory Security** tab.	
14. Click the **Server Certificate** button.	

Procedure	Details
15. Click the **Next** button at the Welcome to the Web Server Certificate Wizard starting screen.	
16. Select the **Assign an existing certificate** radio button, then click **Next**.	

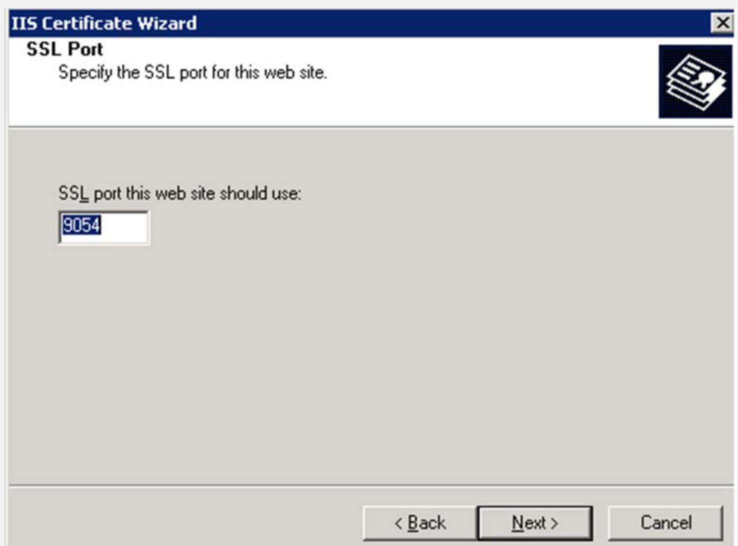
<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>17. Select the correct certificate from the list that was imported by the MicroMD SSL Webservices installer. Click Next.</td><td>



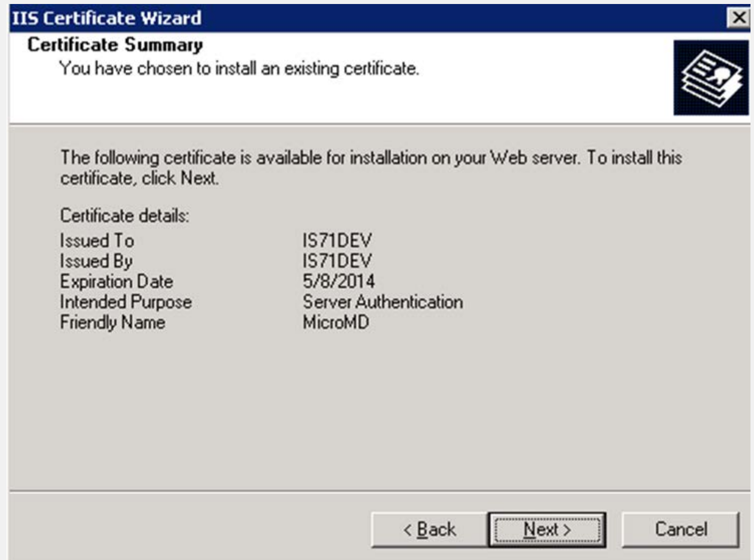
NOTE | The Issued To and Issued By entries will be unique to your install. IS71DEV will not be in this list.

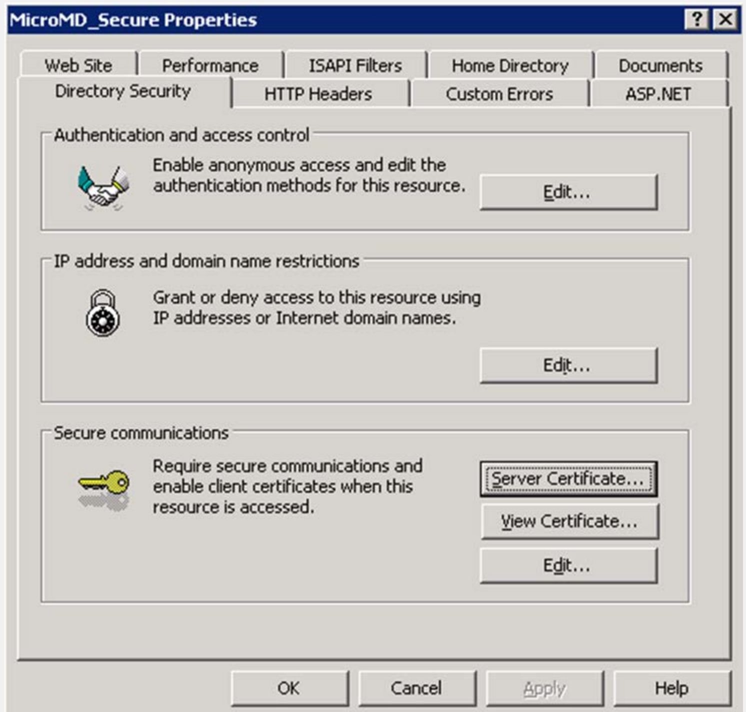
</td></tr>
<tr><td>18. Validate that the correct SSL port is listed that you specified in the MicroMD SSL Webservices Installer, then click Next.</td><td>

The default port will be 9054.



</td></tr>
</table>

Procedure	Details
19. Verify the settings on the Certificate Summary and click **Next**.	
20. Click **Finish** on the final screen of the wizard, Completing the Web Server Certificate Wizard.	

Procedure	Details
21. Click **OK** on the *MicroMD_Secure Properties* window.	
22. Make sure that the necessary port has been opened on the firewall.	

After SSL has been established, MicroMD IT will contact Blackline to test the connection.

Procedure Codes for Online Statement Transactions

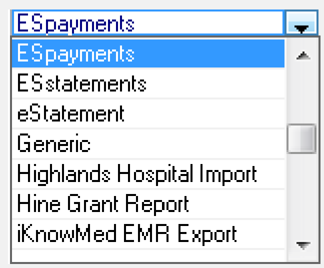
Before setting up the ePayments module, you must add new procedure codes needed for proper transactions within the system. You need to create a code for payments AND as separate code for reimbursed payments. To create a new procedure code:

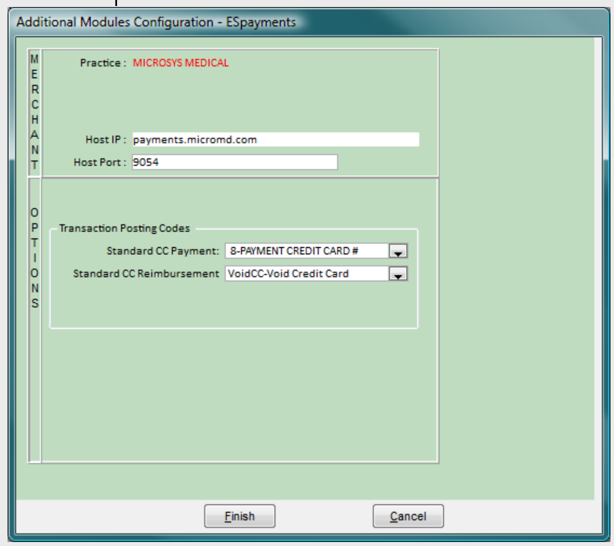
Procedure	Details
1. Select **Maint** > **Procedure** from the main menu.	You can also click the Procedure button ( ) on the launch pane. The Procedure List window appears.
2. Click the **New** icon on the Task Pane.	A blank *Procedure Detail* window opens.
3. Enter the proper information for the new procedure.	**NOTE |** In the *TOS* field, select the entry with the "PD" prefix. Also, verify that the *Co-Pay* checkbox is selected. **STOP |** To make this code available only to a specific practice, you MUST specify it now. Once the code is saved, this field is disabled and cannot be

Procedure	Details
	changed again.
4. Click the Save icon on the Task Pane.	

Add the esPayments Additional Module

To set up MicroMD ePayments for use with MicroMD PM, complete the following steps:

Procedure	Details
1. Open the MicroMD PM software.	
2. Select **Setup** > **Practice Preference**.	The *Practice Preferences* window opens.
3. Click the **Additional Modules** tab.	
4. Click the **New** icon on the Task Pane.	
5. Select *ESPayments* from the *Add-On* drop-down list.	
6. Click the **Save** icon on the Task Pane.	The system prompts you for a security code when you attempt to save. Contact Henry Schein Medical Systems to obtain this key code.

Procedure	Details
ESPayments Configuration	
7. Click the **Setup** icon in the Task Pane	The *Additional Modules Configuration – Espayments* window opens. 
8. In the *Host IP* and *Host Port* fields, enter the proper values.	
9. In the *Transactions Posting Codes* area of the window, enter the procedure codes you created in the above **Procedure Codes for Credit Card Transactions** section of this document.	
10. Click the **Finish** Button.	
11. Click the **Save** icon on the Task Pane.	You must now add the MicroMD ePaymentss module to the system.
12. Click the **New** icon on the Task Pane..	
13. Select *ESpayments* from the *Add-On* drop-down list.	
14. Click the **Save** icon on the Task Pane.	The system prompts you for a security code when you attempt to save.

Revise the eb.ini File

Before you set up MicroMD eStatements module or send test files, you must edit the eb.ini initialization file:

`[Estatement1] path=\\micromdsrv4\micromd\stmt` Where **`path`** is the path to the database.`days=30[estatement]`

```
internet=AUTO
httpAddress=https://rx.micromd.com/RevSpring/RevSpring.svc
```

> NOTE | In the above example, `\\micromdsrv4\micromd\stmt` is the file path to the database. Your file path will differ. Also note that a folder called "stmt" must be added to the database.

> NOTE | Remember to remove all other "[estatement]" values from the eb.ini so the system can send files properly.

Transworld (MicroMD PM)

Transworld is an automatic reminder and collections service that allows a practice to pursue outstanding and late payments.

Available in Version: 8.1.2 or higher

Key Code: Required. The key code is generated by MicroMD Support.

Support: Users requiring support should contact Henry Schein MicroMD at HSMS.support@henryschein.com.

Configuration Instructions

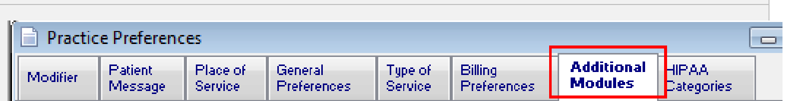
The first step in the set-up process is configuring the payment and write-off ignore codes.

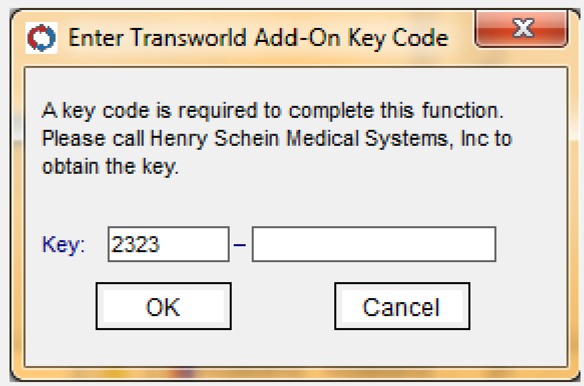
> **NOTE |** There are two separate ignore codes to configure: the Payment ignore code and the Write-Off ignore code. The process for updating each code is nearly identical.

Configuring the payment and write-off ignore codes

Procedure	Details
1. Select **Maint** > **Procedure** from the main menu. This opens the *Procedure List* window.	Payment and write-off ignore codes are set to identify the patient as having been assigned to Transworld.
2. Click the **New** button in the Task Pane. This will open the *Procedure Detail* window.	
3. In the *Code* field, enter a valid (unused) code.	For example, a two-digit number that is not currently being used for a code.
4. In the *Description* field, enter a description for this code.	For example, "PAYMENT Transworld" or "WRITE-OFF Transworld".
5. In the **POS** and **TOS** drop-down menus, select the appropriate options for each.	In the case of a payment, the *POS* field should be **PO**, and the *TOS* field should be PM. In the case of a write-off, the *POS* field should be **W1**, and the *TOS* field should be PP.
6. Create the **Transworld ADJ Code**.	**Ignore Adj. Code**. This is the code your practice will use when posting payments against accounts or sequences that have been sent to Transworld. **NOTE |** Assuming the sequence balance is 0, this code should be used as the adjust to write-off and then the appropriate payment code to report the payment.
7. **AUX** > **Collections** > **Collection Agency** > **New** (enter details and save). **STOP |** This is required for sequence-based collections.	**Collection Agency.** When using sequence-based collections, this is the collection agency that will be used when writing off the sequence balances.
8. Click the **Save** button in the Task Pane when finished.	

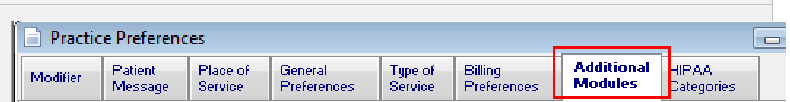
The next step is adding Transworld to the Additional Modules by following the steps below

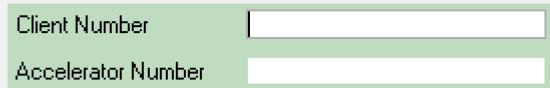
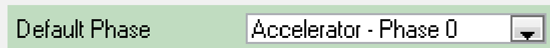
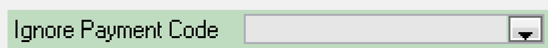
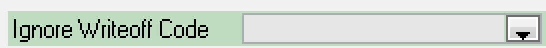
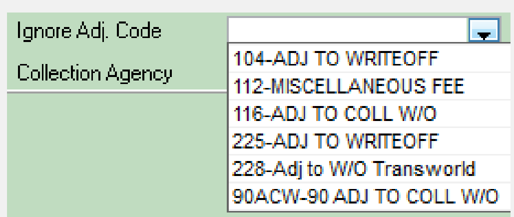
Procedure	Details
1. Select **Setup** > **Practice Preferences** from the main menu. This opens the *Practice Preferences* window.	
2. In the *Practice Preferences* window, select the **Additional Modules** tab.	
3. Click the **New** button in the Task	This will create a new row under the **Additional Modules** tab,

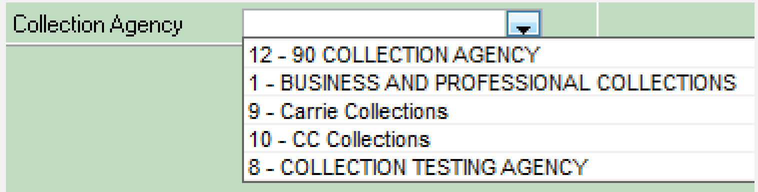
Procedure	Details
Pane.	including a drop-down menu for module selection.
4. Select **Transworld** from the drop-down menu.	
5. Click the **Save** button in the Task Pane when finished.	Once the Save button is clicked, you will be prompted to enter the Add-On Key Code.
6. Enter the Add-On Key code, then click the **OK** button.	The first set of digits (anywhere from 2-5 digits long) represent the practice, and the second set of digits (generally longer than four digits, and alphanumeric as well) are for the add-on module. 

NOTE | An archive folder must be created for Transworld in the database path on the server. After the files are sent to Transworld, they will move to this archive folder automatically in case you need to access them at a later date.

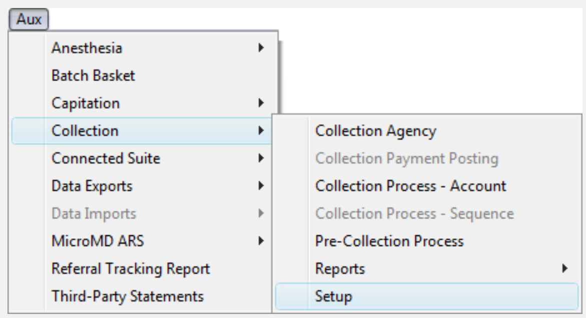
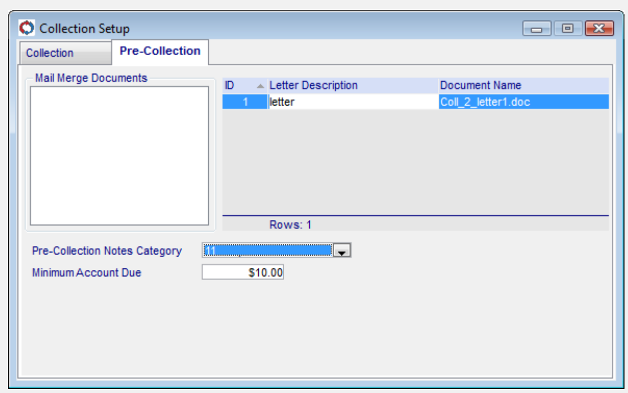
After Transworld has been added to the modules, the Client Number and Accelerator Number (provided by Transworld) must be recorded.

Procedure	Details
1. Select **Setup** > **Practice Preferences** from the main menu. This opens the *Practice Preferences* window.	
2. In the *Practice Preferences* window, select the **Additional Modules** tab and highlight the Transworld record.	

Procedure	Details
3. Click the **Setup** button in the Task Pane.	This will open the *Additional Modules Configuration* window.
4. Enter the client Number in the *Client Number* field, then enter the Accelerator Number in the *Accelerator Number* field. Note that these numbers are provided by Transworld.	
5. In the *Default Phase* drop-down menu, select the phase that will represent the first phase of collections when sending a patient to Transworld.	
6. In the *Default Min Due* field, enter the amount determined by your practice.	It is important that the default minimum amount set is an amount worthy of sending the patient to Transworld for collections. This amount, determined by your practice, should not be too small to be cost effective. 
7. In the *Ignore Payment Code* drop-down*,* select the value you previously recorded for the Ignore Payment code during the set-up procedure in section 1.	
8. In the *Ignore Writeoff Code* drop-down, select the value you previously recorded for the Ignore Write-off code during the set-up procedure in section 1.	
9. In the *Ignore Adj. Code* drop-down, select the code your practice will use when posting payments against accounts or sequences that have been sent to Transworld. Assuming the sequence balance is 0, this code should be used as the adjust to write-off and then the appropriate payment code to report the payment.	

Procedure	Details
10. In the *Collection Agency* drop-down, when using Sequence Based collections, this is the Collection Agency that will be used when writing off the sequence balances.	
11. Click the **Finish** button to close the window, then click the **Save** button in the Task Pane.	

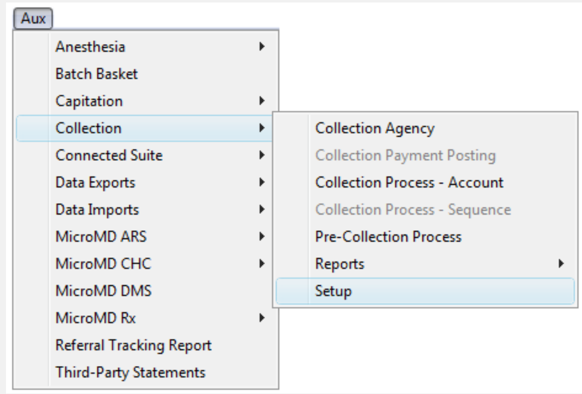
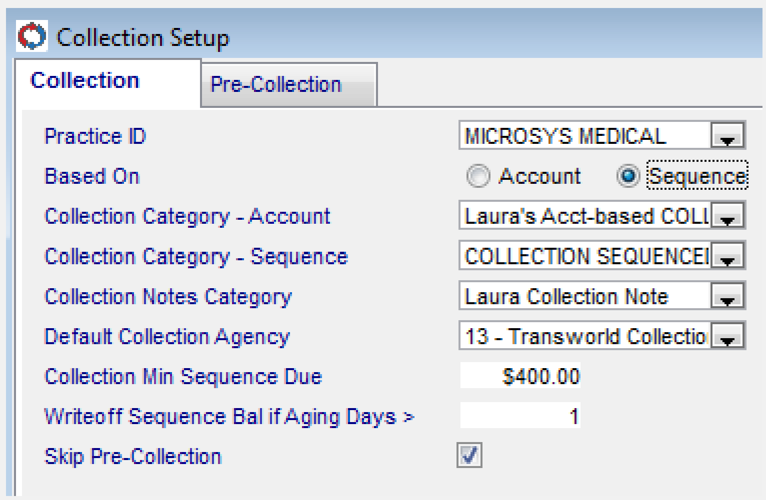
The next step is to set up a "dummy letter". This letter will not be sent to the client, but it needs to be in the system so the pre-collection process report can be functional.

Procedure	Details
1. Select **Aux** -> **Collection** -> **Setup**. This will open the *Collection Setup* window.	
2. Under the **Pre-Collections** tab, make sure at least one letter is listed in the letter list to the right.	

NOTE | For more information on creating pre-collection letters, please refer to the *Pre-Collection Letters* section of *Chapter 17 The Collection Module* in the MicroMD PM Reference Manual.

Transworld can handle account-based collections AND sequence-based collections. If your practice will be doing any sequence-based collections, follow these important steps below.

Next, configure MicroMD PM for sequence-based collections

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>1. Go to Aux > Collection > Setup and select the Collection tab.</td><td>The Collection Setup window will open.

</td></tr>
<tr><td>2. Set the Practice ID if using multiple practice databases.</td><td>
</td></tr>
<tr><td>3. Set the Based On radio button to Sequence.</td><td></td></tr>
<tr><td>4. Set the Collections Category – Account and Collection Category – Sequence.</td><td>NOTE | These must be two different category settings.</td></tr>
<tr><td>5. Set the Collection Notes Category.</td><td>This is based on the value you have set for Collection Notes Category in Practice Preferences.</td></tr>
<tr><td>6. Set the Default Collection Agency to Transworld.</td><td></td></tr>
<tr><td>7. Set the Collection Min Sequence Due.</td><td>This will be the minimum amount of a sequence to qualify for Transworld collections.</td></tr>
</table>

Procedure	Details
8. Set the **Writeoff Sequence Bal if Aging Days** >.	This is the age the sequence must reach before automatic write-off.
9. Uncheck (if it is checked) the **Skip Pre-Collection** box.	
10. Click the **Save** button on the Task Pane and exit the window.	

The table below explains the preferred file format for Transworld.

Field	Length	Required	Data
Client Number	5	Y	Client number
Transmittal Number	10	Y	Responsible Party Account Number
Debtor Name	30	Y	Responsible Party Name
Optional Address	30		
Address	30	Y	Responsible Party Address
City	15	Y	Responsible Party City
State	2	Y	Responsible Party State
Zip	5	Y	Responsible Party Zip
DemandType	1	Y	1=Letters, 2=Direct Assign
ServiceCode	1	Y	Intensity of the first letter
Delinquency Date	6		First Date of Delinquency or Service Date
Amount Due	8	Y	Balance Due
Debtor SSN	9		Responsible Party SSN
Debtor Phone	10		Responsible Party Phone
Secondary Phone	10		Responsible Party Secondary Phone
Comments	256		Blank

Preferred file format in PIPE delimited (Hex 7C)

Formats can be adjusted per your system functionality, and lengths are not specific to the lay

Responsible Party = The person responsible for paying the amount due

Debtor = The person who incurred the debt

Responsible Party and Debtor are very often the same person

Incomplete addresses should be suppressed from sending to TSI – unless project entails skip.

ePayments with Credit Card Swiper only (MicroMD PM)

The credit card swiper allows patients to make payments in the office or over the phone with a credit card.

Available in Version: 8.6.1 or higher

Key Code: Required. The key code is generated by MicroMD Support after the order is sent from MicroMD Accounting.

Support: Users requiring support should contact Moneris.

Configuration Instructions: The client will install the actual card swiper via USB port and MicroMD Support will complete the set-up of the swiping device in the PM.

Procedure	Details
1. Install MicroMD PM 8.6.1 or higher.	See the MicroMD Installation Manual.
2. MicroMD Accounting receives the order for AutoRemind and sends the order to Support to generate the key code and continue set-up.	**NOTE |** The key code is generated by MicroMD Support after the order is sent from MicroMD Accounting.
3. Open the *Practice Preferences* window and select the **Additional Modules** tab.	
4. Select "Device – Credit Card Swipe" from the **Add-On** drop-down menu.	
5. Click the **Save** button and enter the keycode.	
6. Highlight the line and click the **Setup** button in the menu on the left.	This will open the Additional Modules Configuration window.
7. Enter the correct value in the *Host:* field.	Enter: `https://esplus.moneris.com/gateway_us/servlet/mpgrequest`
8. Enter the *Store ID* and *API Token*.	The *Store ID* is created by Moneris and can be found in the welcome letter MicroMD sends to the client. The API Token is given to the client after a phone call to Moneris at 866-696-0488. The store ID will begin with "monus," and the API token is created after the client connects to the Moneris website.
9. In the *Device Type* drop-down, select "IDTECH Encrypted MagSwipe Reader."	
10. Place a check in the *Security Code Required For Refunds and Voids* checkbox if the practice would like an authorization number before a void can occur.	When this checkbox is checked, an *Authorization Code* text field will appear below it. This is the entry field for the authorization number (chosen by the client). Enter a 4 or 5-digit alphanumeric code that

Procedure	Details
	will be known only to management and supervisors.
11. In the Accepted Credit Cards section, place a check in the checkbox next to each type of card the practice will accept.	If American Express is accepted, the practice must inform Moneris. There are additional setup steps (on the Moneris side) for American Express
12. In the *Standard CC Payment:* drop-down, select the payment code the practice has set up for credit card payments, or create a new code if desired.	
13. In the *Standard CC Reimbursement* drop-down, select the payment code the practice has set up for credit card reimbursements, or create a new code if desired.	
14. Click the **Finish** button when the set-up has been completed.	

Procedure codes for credit card payments

Two transaction posting procedure codes will need to be created in order to accept credit card payments. The first is the Credit Card Copay, as shown below. Make sure the *Co-Pay* checkbox is checked.

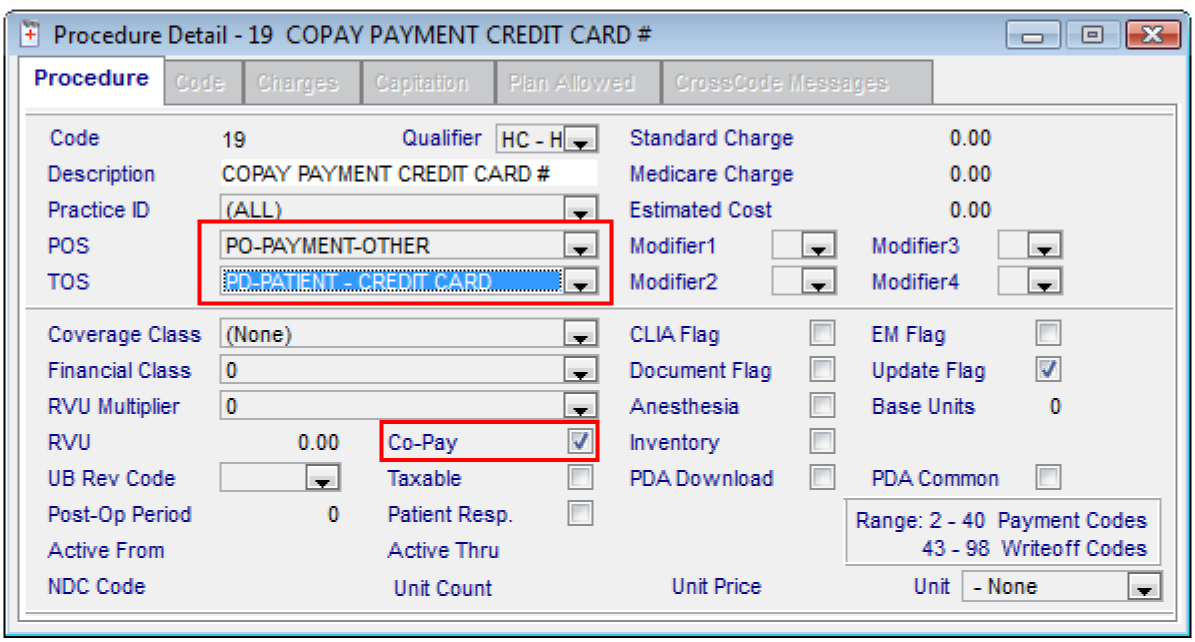


Figure 3.6 Credit Card Copay Procedure Code

The second transaction code that must be created is a Void (Reimbursements) code for credit card payments.

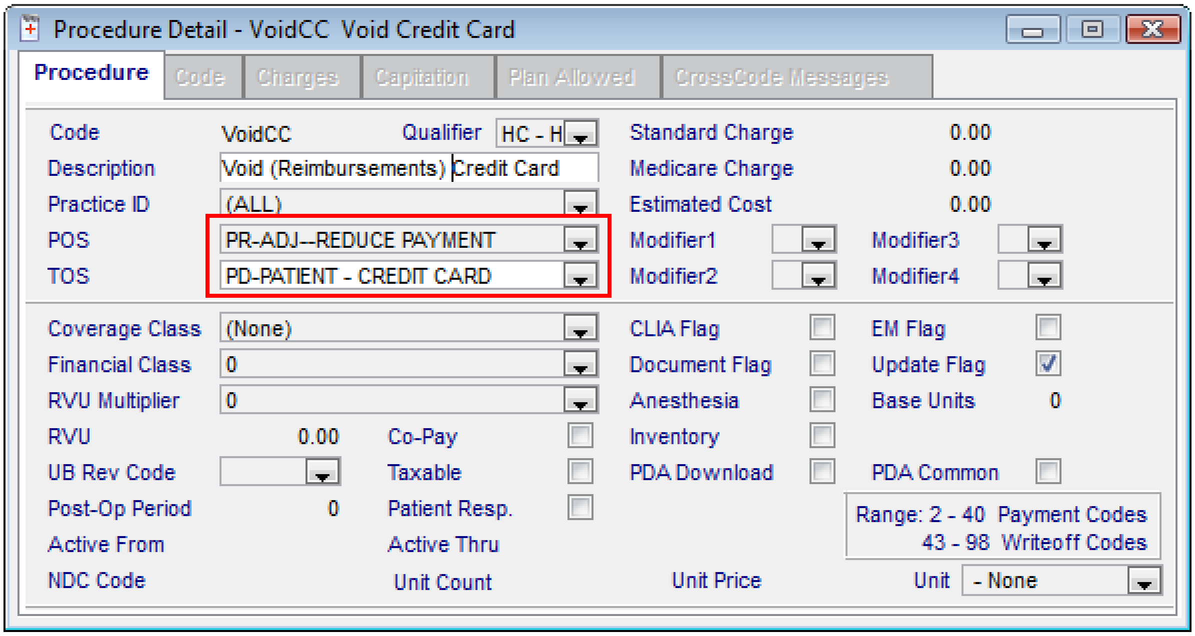


Figure 3.7 Void (Reimbursements) Credit Card Procedure Code

MedicScan (MicroMD PM)

MedicScan is a medical scanning solution for the scanning and saving of medical insurance and identification information and images..

Available in Version: 9.0 or higher

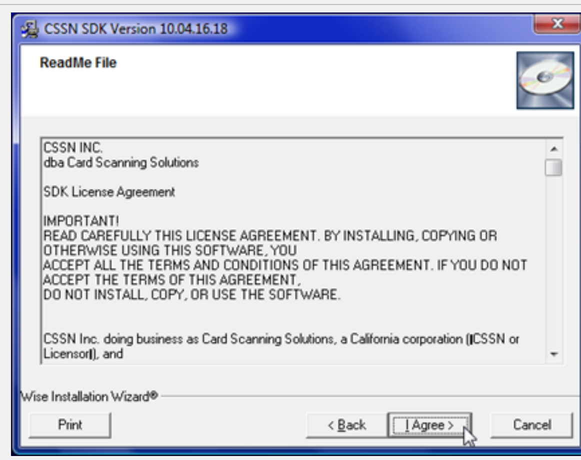
Key Code: Required

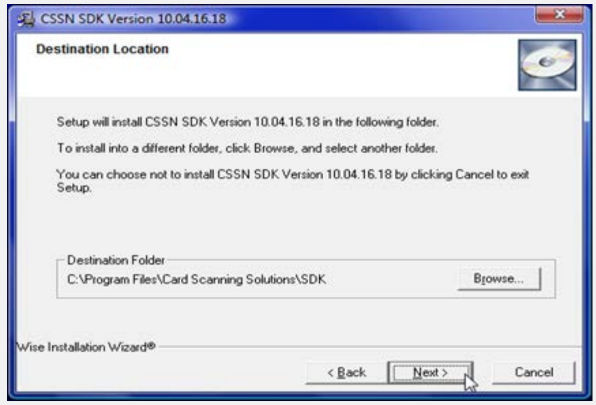
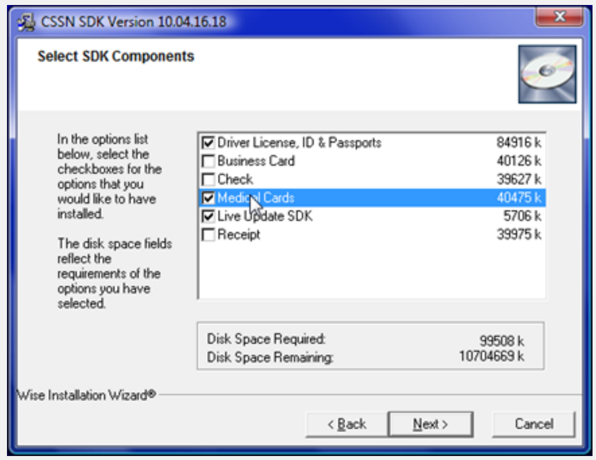
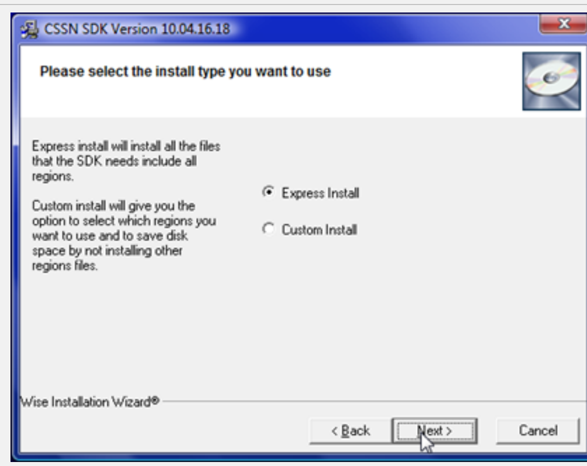
Key codes are generated by MicroMD Accounting when an order is placed. To enter a key code, in MicroMD PM, select **Set Up** > **Practice Preferences**. Then select the **Additional Modules** tab. Create a New line item which will be blank until selection of the appropriate add-on product from the drop down menu. Once you've selected and entered any additional set up info, click **Save**. Once you click **Save** a pop-up box will appear to enter the key code..

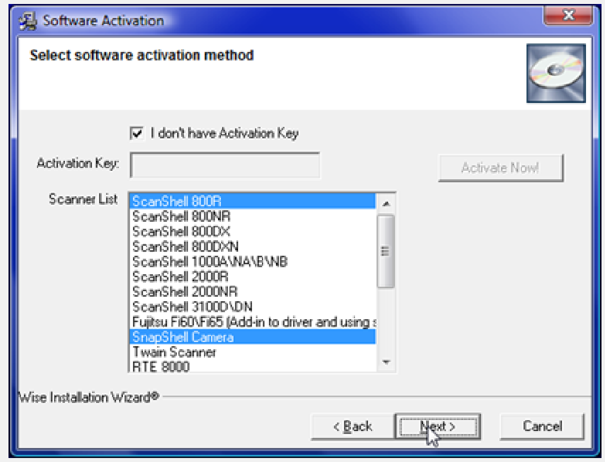
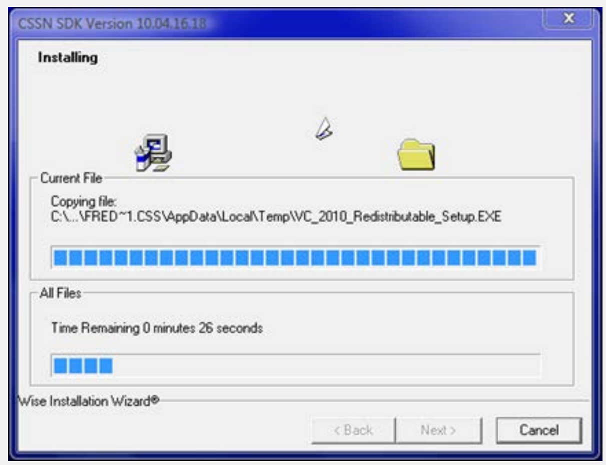
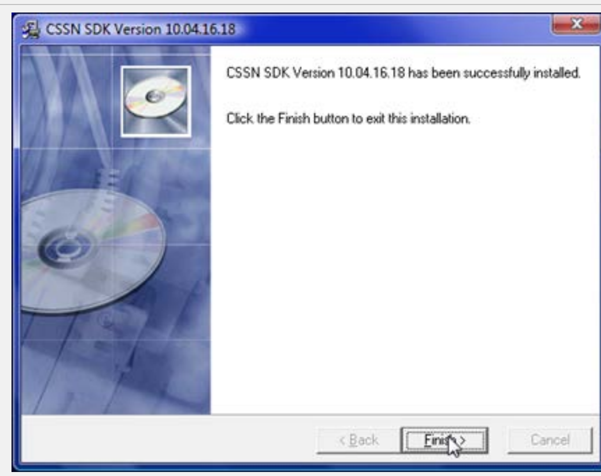
Support: Users requiring support should contact Henry Schein MicroMD at HSMS.support@henryschein.com.

Configuration Instructions: Before starting the installation, it will be necessary to install the latest version of the SDK. To insure that this is a clean install, uninstall everything (SDK, IDScan, etc.) that you may have installed for the operation of the scanning device.

Also, before launching the installer, make sure the scanning device is not connected to the computer.

Procedure	Details
1. Download and install the latest SDK version from the link below (If you are registered): http://www.cssn-developers.com/sdk-download_members.php	If you have not registered, please do so at the link below, then return to the download link in this step. http://www.cssn-developers.com/members/registerapprove.php
2. Click **I Agree** after reviewing the License Agreement.	

<table>
<tr><th>Procedure</th><th>Details</th></tr>
<tr><td>3. Select the installation directory, or leave it as the default (recommended). Click Next.</td><td>
</td></tr>
<tr><td>4. Select the components you would like to install. Click Next.</td><td>
</td></tr>
<tr><td>5. Select the Installation type: Express Install is recommended. Click Next.</td><td>
</td></tr>
</table>

Procedure	Details
6. Select the device drivers for the hardware you wish to install. If you are using a device not listed in the scanner list, and it is a TWAIN device, select the TWAIN Scanner option. Click **Next**.	
7. Wait as the software is installed.	
8. Click **Finish** to complete the installation of the SDK.	
9. Connect the Scanner Device to your computer. If you have installed the correct drivers for it during the installation (step 6), you will see the device listed in "Device Manager" under "USB" or "Imaging Device" once the device is connected.	**NOTE |** The device should be connected to the back side of the computer. Sometimes, when the scanner is connected with a USB hub or to the front side of the computer, it doesn't get enough power for scanning

Calibrating the Scanner

After the Installation of the SDK is complete, you will want to log into your MicroMD PM and calibrate the scanner.

Procedure	Details
1. From the **Plan Set** tab of the patient, chose the plan in the *Plan ID* field, then place the cursor in the *Policy* field.	
2. Click the Scanner icon.	

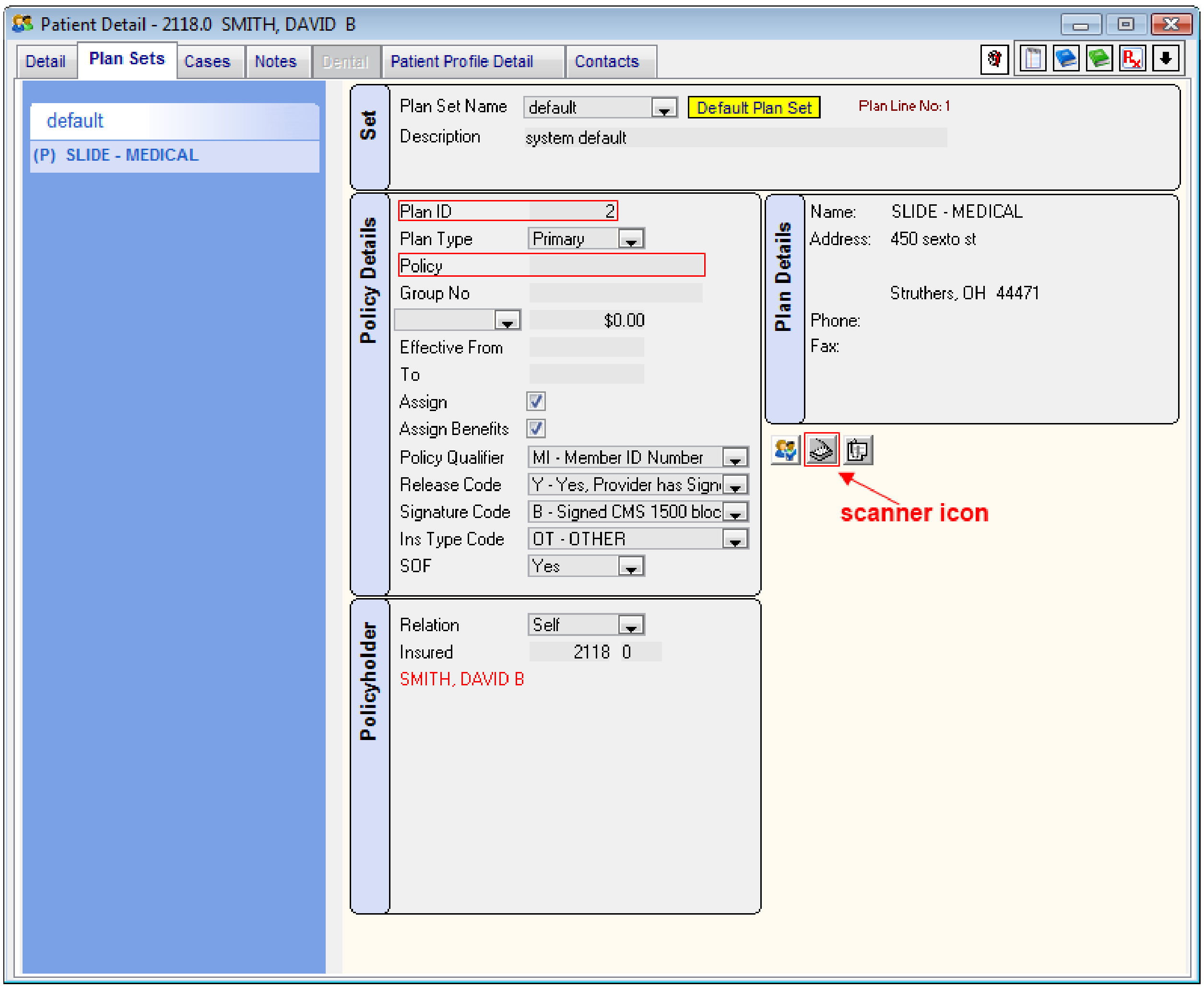


Figure 3.8 First Steps in Calibrating the Scanner

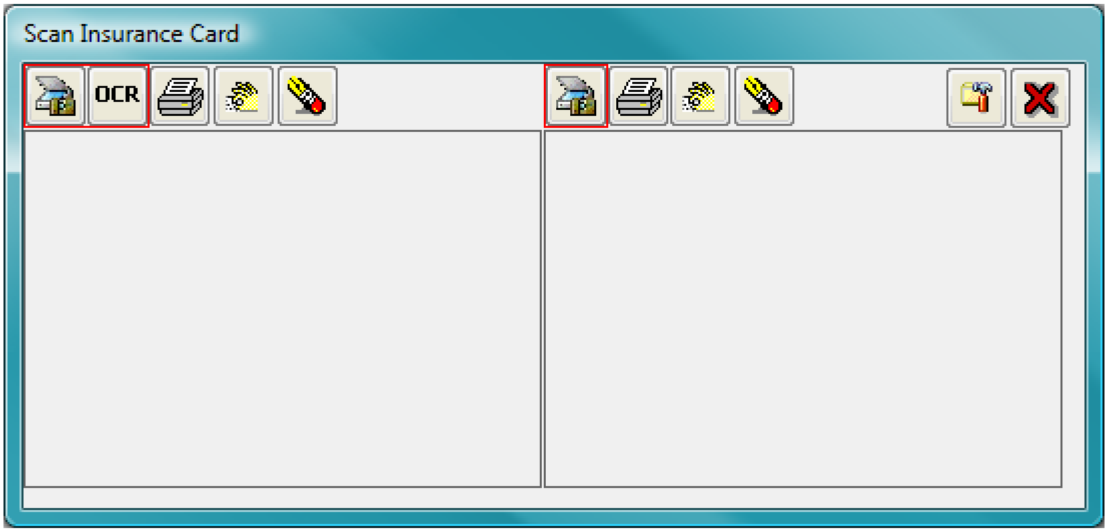
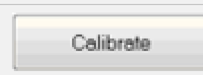
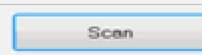
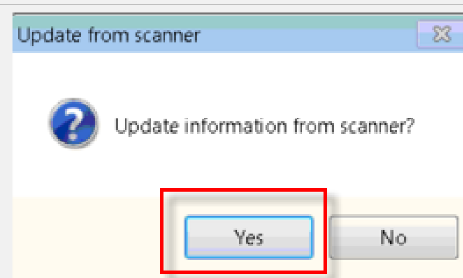


Figure 3.9 The Scan Insurance Card window

Procedure	Details
3. In the Scan Insurance Card window, click the OCR icon or the Acquire Image icon (The button to the left of OCR).	
4. Place the calibration sheet into the scanner. When the paper sensor light is green, click the **Calibrate** button.	Placing the paper snug and to the right should yield the best results.
5. Click the **Calibrate** button.	
6. Place the insurance card in the scanner (snug and toward the right for best results), and click the **Scan** button.	 Both sides of the card will be scanned.
7. Click **OCR**.	You will be prompted with a message asking if you would like to update information from the scanner.
8. Answer “Yes” to have the scanner put the policy number, group number and copay into MicroMD from the card if applicable.	
9. Click **Save**.	The patient’s plan sets tab should now have the card scanned and the information loaded on to this tab. The scanner icon will also turn yellow.

MicroMD Custom Reports - Admin Console and Reports Viewer Configuration (MicroMD PM + EMR)

MicroMD Custom Reporting options are available to both MicroMD PM and EMR clients that have a need for custom reports that are not currently available within MicroMD software. Client server clients may have purchased the "All-access Reports Package" option to create and view their own real-time with their own copy of SAP Crystal Reports. Or client server and cloud clients may have purchased an individual "Reports by Request" where MicroMD will create the report for the client and provide it to be loaded onto a network for access by authorized users. For both options, custom reports are accessible, viewable and exportable through the "MicroMD Reports Viewer" installed on authorized user desktops. This viewer is a separate application, not integrated with MicroMD PM or EMR. The view application should be installed on all authorized user desktops for users to be access the custom reports.

Available in Version: Version 9.0.7 or higher

Keycode: Not currently required, although MicroMD Development will be launching this functionality with a future version. Report viewing access is currently controlled by the installation of the "MicroMD Reports Viewer" on authorized end user desktops. Clients purchasing a custom report will be required to complete and return the "Viewer User Registration Form" identifying authorized users and providing a User Name and Password for each.

Support: Users requiring support should contact Henry Schein MicroMD at HSMS.support@henryschein.com

Additional Configuration Instructions

> **NOTE |** MicroMD Data Services or the VAR is responsible for setting up and administering authorized user names and passwords established by clients through a "MicroMD Custom Reports Viewer Admin" application installed on the SQL Server. MicroMD Data Services or the VAR is also responsible for providing the custom report to the client to be saved on the client-designated network location for access.

The "MicroMD Custom Reports Viewer Admin" should ONLY be installed for MicroMD Data Services or the VAR staff that will be setting up client-established user names and passwords.

The "MicroMD Custom Reports Viewer" should ONLY be installed on the desk top of client-approved users.

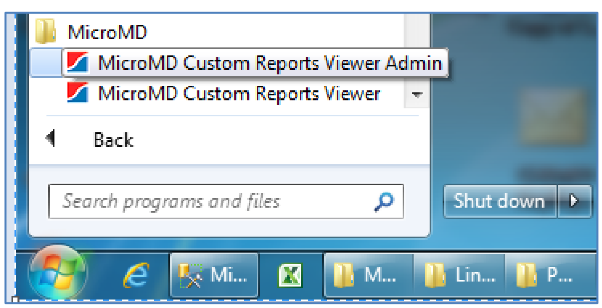
Procedure	Details
1. Receive client completed "Viewer User Registration Form" with user names and passwords for each authorized user approved to access the custom report.	
2. MicroMD Data Services or VAR implementation resource install the "MicroMD Custom Reports Viewer Admin" application on SQL Server.	

Procedure	Details
3. MicroMD Data Services or VAR implementation resource manages the setup of each authorized end user in the “MicroMD Custom Reports Viewer Admin” application.	
4. Receive completed custom report from MicroMD Data Services (If a Report by Request).	
5. MicroMD Data Services or VAR implementation resource saves completed custom report on appropriate client network location.	
6. MicroMD Data Services or VAR implementation resource installs the “MicroMD Custom Reports Viewer” application of the install file on authorized end user desktops.	
7. MicroMD Data Services or VAR implementation resource trains clients on how to access reports, change parameters and export data **[Provide clients with the MicroMD Custom Reports Reports Viewer User Manual (MicroMD PM + EMR)]**	

Install the MicroMD Custom Reports Viewer Admin (MicroMD +VAR Internal Implementation Staff)

When the “The MicroMD Custom Reports Viewer Admin” application is selected during the install process – it is only added to the Start->All Programs-> MicroMD menu only – we do not create a desktop shortcut.

Start menu shortcut:

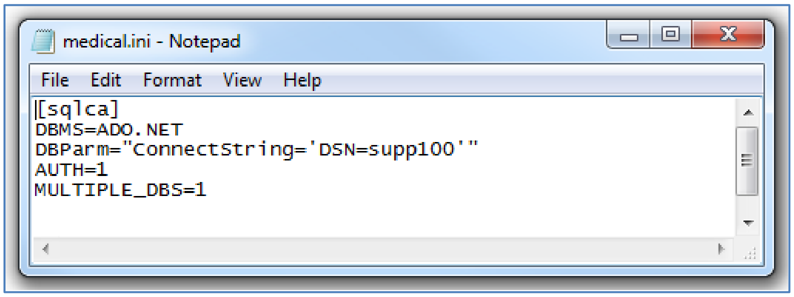


The “MicroMD Custom Reports Viewer” and “MicroMD Custom Reports Viewer Admin” can be installed in a single database environment or in a multi-database environment. This is controlled with the medical.ini configuration file the same as with other multiple database environments related to MicroMD PM or EMR.

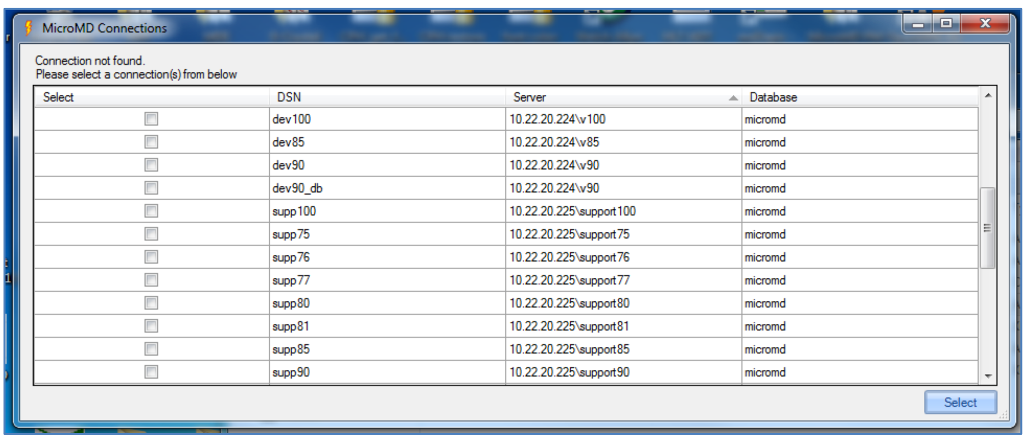
Setting up Client-authorized User Names and Passwords

If opting to connect in a multi-database environment as the .ini file outline below, a pick list with then be displayed to allow for selection of the appropriate database to connect to set up the authorized user names and passwords.

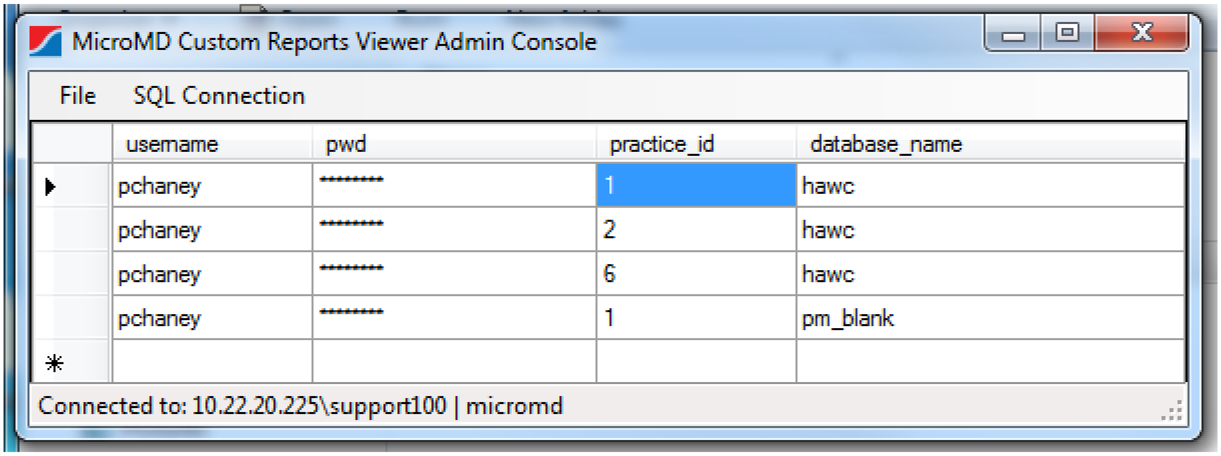
When opening the Admin application the MicroMD Connections window shown in the General section will open if the medical.ini is set to multiple databases … MULTIPLE_DBS=1… after checking the desired database and clicking the Select button the Admin window will open.



If set up for multi-database, this window will open to select the appropriate database



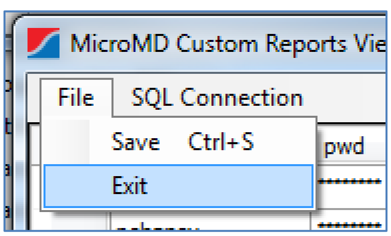
One the database is connected, a spreadsheet type window will open to allow for entry of usernames and passwords. Create a row for each authorized user for that database.

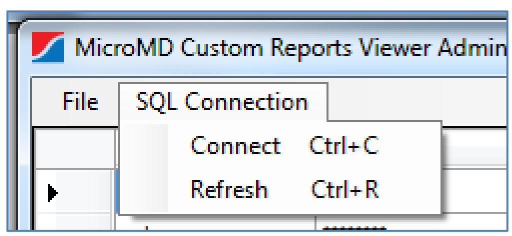


NOTE | When there is a multiple practice setup, the same user name may be used multiple times (not recommended) for each practice – but the password for each practice must be unique. If a user name is used more than once with the same password there is no guarantee as to which practice database the end user connection will connect to.

After entering (or updating) a row click "Save" from the menu below to save the information back to the database.

Then click Exit to exit the admin application.





If an incorrect database is selected, use the Connect & Refresh menu items above to connect to or to refresh a database connection with the Custom Reports Viewer Admin data. These menu options allow the MicroMD Database Connections window to be redisplayed for to select another database when in a multi-database setup if a database is mistakenly selected that is not compatible with MicroMD Custom Reports Viewer (9.07 or higher). You will then be able to reselect the correct database connection.

Saving the Custom Report to the Client's Network

Saving the report to a Client Server Network: For Reports by Request, MicroMD Data Services will create and provide the final report file to be saved to the client-designated location where they would like to access the report.

Saving the report to MicroMD Cloud Based: For internal MicroMD Data Services staff needing to save the file to the MicroMD Cloud Based network, Data Services will need to open a HELP DESK ticket that includes the Practice OP ID and Name and request that that report and viewer be published for the client.

Installing the MicroMD Custom Reports Viewer on End User Desktops

Once a the approved user names and passwords have been established for the client in the MicroMD Custom Reports Viewer Admin, coordinate time to install the MicroMD Custom Reports Viewer on end user desktops. Installing the viewer on only authorized end user desktops will control access to custom reports. Once the viewer is installed, the client may be trained on how to access and manage their custom reports *[Provide clients with the MicroMD Custom Reports Reports Viewer User Manual (MicroMD PM + EMR)]*

MULTIPLE PRACTICES

CHAPTER 4

Although Chapter 1 mentions multiple practices, this chapter focuses on information specific to multiple-practice systems. There are two options with multiple practices: multiple practices with a single database or multiple practices with multiple databases.

MULTIPLE PRACTICES WITH A SINGLE DATABASE

There are several important benefits to setting up a multiple-practice system with a single database. Using a single database allows practices to share several tables. Sharing database tables saves time in the initial setup. Multiple practices in the same database share the diagnosis, employer, explosion code, plan, procedure, referring doctor, service facility, and zip code tables.

Security Issues

If security is a concern when using a single database for multiple practices, the supervisor can restrict the access rights of all users. Supervisors can restrict access to certain modules of the program and to specific practices. Refer to *Step 13: Establish Security Settings* for more information.

Charge Classes

Once users enter the practices and providers into the system, create charge classes for each practice. Refer to the *Charge Classes Tab* section for a brief overview. Practices use these charge classes in the *Procedure Detail* window to set fees based on practices. This allows for different practices in the same database to have different pricing for the same procedures.

Diagnosis Codes

Users can enter diagnosis codes for use by all practices or by a specific practice. Refer to the Diagnosis Classes Tab section.

> **STOP |** FOR MULTI-PRACTICE SINGLE DATABASE: If you want to specify a specific practice for a code, you MUST do so when creating the diagnosis code. You WILL NOT be able to edit this field later. Make the appropriate selection from the *Practice* drop-down list or select *ALL* for all practices.

Procedure Codes

Users can enter procedure codes for use by all practices or by a specific practice. Users can create the same procedure multiple times and assign each of these procedures to a particular practice.

> **STOP |** FOR MULTI-PRACTICE SINGLE DATABASE: If you want to specify a specific practice for a code, you MUST do so when creating the procedure code. You WILL NOT be able to edit this field later. Make the appropriate selection from the *Practice* drop-down list or select *ALL* for all practices.

For procedures available to all practices, the user can set different prices for the same procedure based on charge classes.

Copying Patients

Although practices do not share the patient table, users can copy patients from one practice to another using the Patient Copy Utility. Use the following procedure to accomplish this.

Procedure	Details
1. Select **Utility** > **Patient Utilities** > **Copy Patient** from the main menu.	The *Patient Copy Utility* window opens. 
2. In the *Source Patient* area, select a practice from the drop down list.	
3. Enter the patient's name or number in the field next to the *Practice* drop-down.	This field is also searchable. Type in part of the name, etc. and MicroMD PM presents a list of possible matches.
4. In the *Destination Patient* area, select a practice from the drop down list.	
5. To allow the system to assign the next available number automatically, select the *Assign Next Number* checkbox.	To assign the patient a number manually, type it in the field next to the practice drop-down.
6. Select the information you want to copy to the new practice.	
7. Click the **Copy Patient** icon on the Task Pane to add the patient to the new practice.	

Global Search

To activate this feature, place a check mark in the *Multi-Practice* box on the **System Preferences** tab of the *System Preferences* window. (Only those with Supervisor privileges have access to this checkbox.)

When searching for patients using the *Patient List* (under **Maint** > **Patient**) the user has the option to search globally across all practices. To do this, check the *Global Search* box in the *Patient List*. When the user generates a search, the system looks in all practices to find matching patients.

MULTIPLE PRACTICES WITH MULTIPLE DATABASES

A multi-practice system can use multiple databases. When using multiple databases, practices do not share information. MicroMD PM stores the information for each practice in a separate virtual database. With multiple databases, users cannot perform global searches or copy patients from one practice to another.

All the common codes such as the diagnosis, employer, explosion, plan, procedure, referring doctor, service facility, and zip codes that practices can share within the same database are no longer accessible across multiple databases.

Practices that do not have much common data, such as a general family practice and an anesthesiology practice may find this option more beneficial. Extremely large practices with multiple providers and a large patient count may also find it beneficial to use multiple databases.

Multiple databases benefit those offices using remote connectivity, where security may be of extreme concern. We recommend multiple databases for offices using ASP remote connectivity.

MEDICAL.INI

APPENDIX A

The *medical.ini* file contains basic MicroMD PM set up information. The location of the *medical.ini* file varies depending on the version of Windows and whether the computer is a server or a workstation.

The following is a list of the locations of the *medical.ini* file (where **%userprofile%** is the login name of the user):

Type of Install (Windows version)	Location of medical.ini
Server (Windows 2003)	*c:\documents and settings***%userprofile%***\medical*
Server (Windows 2008)	*c:\users***%userprofile%***\medical*
Workstations (all Windows versions)	*c:\Program Files\HSI\MicroMD PM Client*

The program automatically sets most of the information contained in this file; however, some information must be set up manually.

> **NOTE |** Refer to the *MicroMD PM Software Installation Manual* for more detailed instructions on modifying the *medical.ini*.

MORE USES OF THE EB.INI FILE

APPENDIX B

FUNCTIONALITY OF THE FILE

The *eb.ini* file is can control the following:

- Renaming the Claim File
- Deleting the Old Report Files
- Printing Report Files
- Deleting Old Remit Files
- Specifying Remit Files to Rename
- Opening a Webpage to Send Claims or Receive Remittance
- Setting Values for Archive
- Setting Some Values in the Creation of the Claim File

> **NOTE |** Unless otherwise specified, all of the items and arguments are OPTIONAL. If no information is present in the eb.ini, then MicroMD PM will continue to act as it normally does.

Renaming the Claim File

- All commands **must** end with a semicolon (`;`)
- The only valid commands for the `claim=` keyname are:
  - `(renamefile)filename;`
  - `(zipfile)filename;`

  renamefile attributes:

  - This command renames the claim file that MicroMD PM creates to a specific name. If no path is specified, it will default to the path in the HyperACCESS section of the *eb.ini*.
  - Example: `(renamefile)testfile.txt;`

  zipfile attributes

  - This command zips the claim file using PKZip compression. If the renamefile command is used, it will zip the renamed file; otherwise, it will zip the file that MicroMD PM creates. If no path is specified, it will default to the path in the HyperACCESS section of the *eb.ini*.
  - Example: `(zipfile)testfile.zip;`

- Some carriers require a naming convention that uses a sequential counter, the Julian date, or some form of a date/time stamp. Any of these statements can be used when renaming or zipping a file. These can be added to the filename using the following methods:
  - To add a sequential counter to the filename:
    - Add a keyname in the *eb.ini* called `COUNT` and indicate the starting number.

      ```
      [MDFL1]
      COUNT=123
      ```

    - Inside the claim keyname, you must place a bracketed COUNT statement, specifically stating the format of the number to be used.

      ```
      claim=(zipfile)c:\hawin32\claim[COUNT###].zip
      ```

    This will create a file called *claim123.zip*. It will then increment the counter by one and write it back to the *eb.ini* for the next transmission. In this example, once the number "999" is reached, it will roll the counter back to "1".
  - A Julian date is the number of days since January 1 of any given year. January 1 would be a Julian day of 1. December 31 of a non-leap year would be 365. To add a Julian date to your claim file:

    Inside the claim keyname, you must place a bracketed Julian statement, specifically stating the format of the number to be used.

    ```
    claim=(zipfile)c:\hawin32\claim[JULIAN###].zip
    ```

    This will create a file called *claim003.zip* if batched on January 3.

    If you use less than three pound signs (#), it will take that number of digits starting from the right of the Julian date:

    ```
    claim=(zipfile)c:\hawin32\claim[JULIAN#].zip
    ```

    This will create a file called *claim3.zip* if batched on January 3, ignoring the first two digits.
  - To add a date to your filename:

    Inside the claim keyname, you must place a bracketed `DATE` statement, specifically stating the format of the date to be used.

    ```
    claim=(zipfile)claim[DATEmmddyyyy].zip
    ```

    This will create a file called *claim01012009.zip* if batched on January 1, 2009.

    You can use the following formats for months, days, and years:
    - **Months**: `mm` will always give you a two-digit month (e.g., `03` or `12`), `m` will give you a one- or two-digit month (e.g., `3` or `12`)
    - **Days**: `dd` will always give you a two-digit day (e.g., `07` or `23`), `d` will give you a one- or two-digit day (e.g., `7` or `23`)
    - **Years**: `yyyy` will always give you a four-digit year (e.g., `2009`), `yy` will always give you a two-digit year (e.g., `09`)

You can use the format in any order that is required.

Example:

```
[MDDE1]
claim=(zipfile)claim[DATEyymd].zip
```

This will give you a file called *claim09723.zip* if batched in July 23, 2009.

> **NOTE |** If an invalid format is used, no date will appear in the file. Example: `claim=claim[DATEwrong].zip` will return *claim.zip.*

– To add a time stamp to your file:

Inside the claim keyname, you must place a bracketed TIME statement, specifically stating the format of the time to be used.

```
claim=(zipfile)claim[TIMEhhmm].zip
```

This will create a file called *claim1447.zip* if batched at 2:47 PM.

You can use the following formats for hours, minutes, and seconds:

- **Hours** (always in military time): `hh` will always give you a two-digit hour (e.g., `09` or `15`), `h` will give you a one- or two-digit hour (e.g., `9` or `15`)
- **Minutes**: `mm` will always give you a two-digit minute (e.g., `07` or `45`), `m` will give you a one- or two-digit minute (e.g., `7` or `45`)
- **Seconds**: `ss` will always give you a two-digit second (e.g., `01` or `59`), `s` will give you a one- or two-digit second (e.g., `1` or `59`)
- Any combination of the above values can be used together.

  For example: A carrier requires a two-digit sequential counter, a three-digit Julian date, the month, day and year, as well as the hour and minute a file was created as the filename sent to them, the following value could be made:

  ```
  count=24
  claim=(renamefile)[COUNT##]_[JULIAN###]_[DATEmmddyy]_[TIMEhhmm
  ].CLM
  ```

  This will create a claim file called *24_001_010109_1452.CLM* if it was created on January 1, 2009, at 2:52 PM. Notice that the underscores outside of the brackets are included in the filename.

– Example and Explanation

Blue Shield of Virginia (BSVA) tells you that the claim file must be *tnv0000.clm* and then zipped and renamed *tnv0000.zip*. In the *eb.ini* file, you would enter:

```
[BSVA1]
report_delete=c:\hawin32\tnv0000.clm;c:\hawin32\tnv0000.zip;
claim=(renamefile)c:\hawin32\tnv0000.clm;(zipfile)c:\hawin32\tnv0
000.zip;
```

The claim keyname specifies that the claim file will be renamed to *tnv0000.clm* and then zipped to *tnv0000.zip*.

> **NOTE |** If a script is being used, make sure that it is sending the file that you are creating.
>
> Make sure to delete the files that are created with the claim keyname, with the `report_delete` keyname. Failure to do so could cause errors when trying to rename or zip a file.

Deleting the Old Report Files

- All commands must end with a semicolon (`;`)
- The `report_delete` keyname contains a list of files to be deleted before the claim file is renamed or zipped.
- If no path is specified, it will default to the value in the path keyname in the HyperACCESS section of the *eb.ini*.
- Examples and Explanation

  Example 1:

  MCSC sends zipped reports named *m* and *bcl* that are renamed to *m.zip* and *bcl.zip* respectively. These reports are then unzipped to *m* and *bcl*. The renamed files and the reports must be deleted.

  ```
  [HYPERACCESS]
  path=c:\hawin32\
  [MCSC1]
  report_delete=m.zip;m;bcl.zip;bcl;
  ```

  Since no path was specified in the `report_delete` keyname, it will use the path value specified in the HyperACCESS section above to delete the proper files. If another path is used for reports, such as *c:\temp*, you must specify the value for the path.

  ```
  [MCSC1]
  report_delete=c:\temp\m.zip;c:\temp\m;c:\temp\bcl.zip;c:\temp\bcl;
  ```

  Wildcards may be used to delete multiple reports at the same time. Extreme caution must be taken when using these because all files that meet the criteria will be deleted and unrecoverable.

  Example 2:

  BSIN sends reports back named *aal**, *rp** and *map**. The *** represents a string that follows the name and can be anything the carrier sends back. For example, *aal07221402*. Make sure that there will be no conflicts in the directory used to store the report files so that nothing inadvertently gets deleted.

  ```
  [BSIN1]
  report_delete=c:\hawin32\aal*;c:\hawin32\rp*;c:\hawin32\map*;
  ```

> **NOTE |** It is highly recommended that the whole path and filename be explicitly stated when using wildcards to delete reports.

Printing Report Files

- How to specify the number of reports that are retrieved from the carrier

  The `report_number=` keyname tells MicroMD PM how many reports to handle. It takes a number as an argument and is **not followed** by a semicolon. The number can be any number that is required for the carrier.

  `report_number=2`

- All `reportX` (where **X** is a number) keynames must have values that are followed by a semicolon (`;`).
- If no path is specified for a command, it defaults to the path in the HyperACCESS section of the *eb.ini*.
- The only valid commands for the `reportX` keyname are:
  - `(zipfile)filename;`
  - `(renamefile)filename;`
  - `(unzippath)path;`
  - `(printfileN)filename;`
  - `(997file)filename;`

Command	Attributes
`PrintfileN`	This command specifies the report file to print and the font size (**N**) used when printing. The default font size, if not specified, is `8` (the minimum font that can be printed). This command is useful in performing all other functions if necessary, as well. Example: `(printfile10)c:\temp\835;`
`zipfile`	Specifies the file to be unzipped using PKZip decompression. Example: `(zipfile)835;`
`renamefile`	Renames the report that has been downloaded from the carrier to a specific name. Example: `(renamefile)835.zip;`
`Unzippath`	This indicates to the system where to place the unzipped file. Example: `(unzippath)c:\temp\;`
`997file`	This tells MicroMD PM that the incoming file is an ANSI 997 Functional Acknowledgement file, and that the program must interpret it. It will generate a report on the window rather than sending it to the printer. The user can then print the report from within MicroMD PM. Example: `(997file)c:\hawin32\997;`

Example 1

PRIN has three different reports to be handled, *m* and *bcl* are reports to be printed, and the *997* report is a functional acknowledgement. All three reports arrive zipped, and must be renamed to *m.zip*, *bcl.zip*, and *997.zip* before being unzipped to *m*, *bcl*, and *997*. In this example, a different path will be used to print the reports.

```
[mcoh1]
report_delete=m.zip;c:\temp\m;bcl.zip;c:\temp\bcl;997.zip;c:\temp\997;
report_number=3
report1=(printfile8)c:\temp\m;
report2=(printfile8)c:\temp\bcl;
report3=(printfile8)c:\temp\997;
```

Wildcards may be used to print multiple reports that have similar names, all at the same time.

Example 2

BSIN sends reports back named *aal**, *rp** and *map**, none of which are zipped. The *** represents a string that follows the name and can be anything the carrier sends back. For example, *aal07221402*.

```
[BSIN1]
report_delete=c:\hawin32\aal*;c:\hawin32\rp*;c:\hawin32\map*;
report_number=3
report1=(printfile10)c:\hawin32\aal*;
report2=(printfile10)c:\hawin32\rp*;
report3=(printfile10)c:\hawin32\map*;
```

> **NOTE |** We highly recommended that you explicitly state the whole path and filename when using wildcards to print reports.
>
> If you do not include a `report_number` keyname, the default action of MicroMD PM will be taken.
>
> Make sure that all reports are deleted, otherwise a conflict could result when retrieving, renaming, or unzipping files takes place.

Deleting Old Remit Files

- All commands within the `remit_delete` keyname must end with a semicolon (`;`)

  This keyname contains a list of files to be deleted before the remittance files are renamed or unzipped.

- If no path is specified, it will default to the path in the HyperACCESS section of the *eb.ini*.
- Examples and explanation

  MCSC sends zipped remittance files named *835* that are renamed to *835.zip*. These remits are then unzipped to **.rmt*. The remit files and the zip file must be deleted.

```
[HYPERACCESS]
path=c:\hawin32\
[MCSCREM1]
remit_delete=835.zip;*.rmt;
```

  Since no path was specified, it will use the path specified in the HyperACCESS section above to delete the proper files. If another path is used for remits, such as *c:\temp*, you must specify that path. Wildcards may be used to delete multiple remits at the same time.

```
[MCSC1]
remit_delete=c:\temp\835.zip;c:\temp\*.rmt;
```

> **STOP** | Extreme caution must be taken when using wildcards because all files that meet the criteria will be deleted and unrecoverable.

> **NOTE** | We highly recommended that you explicitly state the whole path and filename when using wildcards to delete reports.
>
> The remit files to be posted from the remit path are not deleted with this command. Only files that have been downloaded and copied to the remit path previously are the files that should be deleted.
>
> Do not use the remit path to store temporary files because this could cause unrecoverable deletion of the files that the client needs to post into MicroMD PM.

Specifying Remit Files to Rename

- All commands in the remit keyname must end with a semicolon (;)
- The only valid commands for the remit keyname are:
  - `(zipfile)filename;`
  - `(renamefile)filename;`
  - `(unzippath)path;`
  - `(remitfile)filename;`

Command	Attributes
`zipfile`	Specifies the file to be unzipped using PKZip decompression. Example: `(zipfile)c:\hawin32\mccorem\remit;`
`renamefile`	Renames the report that has been downloaded from the carrier to a specific name. Example: `(renamefile)c:\hawin32\mccorem\remit.zip;`
`Unzippath`	This indicates to the system where to place the unzipped file. Example: `(unzippath)c:\hawin32\mccorem\;`
`remitfile`	This is the file or set of files that will be renamed to the MicroMD PM naming convention for remittance files. This file will be copied into the remit directory specified in the remittance setup in MicroMD PM. Example: `(remitfile)c:\hawin32\mccorem\rtpfil.*;`

- Examples and explanation

  MCCAREM has no known naming convention for their remit files. Therefore, it is necessary to have a special directory just for that carrier. In this example, a directory has already been created (*c:\hawin32\mccarem*). All files in this directory will be copied to standard MicroMD PM naming convention in the remittance path.

  ```
  [mccarem1]
  remit_delete=c:\hawin32\mccarem\*.*;
  remit=(remitfile)c:\hawin32\mccarem\*.*;
  ```

> **STOP** | Extreme caution must be taken when using wildcards because all files that meet the criteria will be copied to the remit path specified in remittance setup. This could include files that are not really remit files.

> **NOTE** | We highly recommended that you explicitly state the whole path and filename when using wildcards to rename remit files.
>
> Do not use the remit path to store temporary files. This could cause unrecoverable deletion of the files that the client needs to post into MicroMD PM.

Opening a Webpage to Send Claims or Receive Remittance

MicroMD PM allows more control of where the claims are being sent. Generally, HyperACCESS will be opened and begin to dial a BBS to send claims to. With ANSI, more carriers allow claims to be sent via website, also known as a URL (Uniform Resource Locator). This feature allows offices with an internet connection to open the webpage used to send the claims.

Two items must be completed for this feature to work:

- Set the *eb.ini* haw and `ahaw` keyname values to INTERNET

  Example

  The Consult clearinghouse has a website (*www.4ecp.com*) to which you can submit claims.

  ```
  [CONS1]
  haw=INTERNET
  ahaw=INTERNET
  ```

- Set the *eb.ini* url keyname, in the appropriate section, to the website to be used

  Example

  ```
  [CONS1]
  URL=http://www.4ecp.com
  ```

The optional keyname in the *eb.ini*, `MSG`, allows a custom message to be displayed to the user. This message may be used to inform them of the path and file to be sent, or any other message that would be useful. If no message exists, the default message will be: "**Please send claims via Internet and Click OK after you have finished sending your claims!**" The message box stays on top of MicroMD PM, but is not visible after the web browser opens. The user must click on the message box before any activity can be resumed in MicroMD PM.

- Example

  The biller wants to be informed of where the file is to be uploaded to the clearinghouse. The path the file is batched to is *\\Server Name\MicroMD*

  ```
  [CONS1]
  MSG=Please send \\Server Name\MicroMD\cons1.ans via Internet and
  Click OK When finished.
  ```

  > **NOTE |** The `MSG` entry can only be on one line. Anything on the next line will be ignored.

- Example

  The client has an internet connection and wants to send claims to The Consult web page rather than dialing in to the BBS:

  ```
  [CONS1]
  haw=INTERNET
  ahaw=INTERNET
  URL=http://www.4ecp.com
  MSG=Log in to webpage and send \\Server Name\MicroMD\cons1.ans
  ```

Setting Values for Archive

- The `ARCHIVE` section allows the user to control the length of time the deleted files remain in the archive and where to place them.
- Each file that gets deleted will be placed into the archive. If you do not specify a path, it will default to the path in the HyperACCESS section of the *eb.ini* and create a subdirectory called *ARCHIVE*, otherwise the path specified in the *eb.ini* will be used.
- The default value for MicroMD PM is 30 days if the `days` keyname does not exist in the *eb.ini*.
- If you enter a value of zero (`0`), then files will remain in the archive for an indefinite period of time.
- Files stored in the archive include claim files and any reports downloaded from the carrier.
- Example 1

  ```
  [ARCHIVE]
  path=/\Server Name\MicroMD\archive\
  days=30
  ```

  These instructions keep files for 30 days in the directory listed using the `path` keyname.
- Example 2

  ```
  [ARCHIVE]
  path=\\Server Name\MicroMD\archive\
  days=0
  ```

  These instructions keep files indefinitely and place all files in a subdirectory called *ARCHIVE* in the path specified in the HyperACCESS section of the *eb.ini*.

> **NOTE |** The only known limitation to keeping files indefinitely is the amount of space used on the storage device.

Setting Some Values in the Creation of the Claim File

The ANSI claim file can be modified slightly using the *eb.ini*. The following keynames are the only ones that can be set for each carrier. The `element`, `component`, and `segment` keynames can all be used within a single entry.

Keyname	Description

`element`	This value specifies the element separator to be used in creating the claim file.
	
	Example: BSCA has contacted the client and indicated that they do not want the default element separator MicroMD PM uses (asterisk (*)). Instead, they want the ampersand symbol (&). In the *eb.ini* file, you would type:
	
	`[BSCA1]`
	
	`element=&`

`component`	This value specifies the component separator to be used in creating the claim file.
	
	Example: BSCA has contacted the client and indicated that they do not want the default component separator MicroMD PM uses (colon (:)). Instead, they want the greater than symbol (>).
	
	`[BSCA1]`
	
	`component=>`

`segment`	This value specifies the segment terminator to be used in creating the claim file.
	
	Example: BSCA has contacted the client and indicated that they do not want the default segment terminator MicroMD PM uses (tilde (~)). Instead, they want an exclamation point (!).
	
	`[BSCA1]`
	
	`segment=!`

`2010aaref_`	This keyname allows you to add a second submitter ID to the electronic claim file in the 2010AA loop. Simply edit the *eb.ini* file with the `2010aaref_` keyname to tell MicroMD PM which provider to include in the 2010AA loop of the claim file.
	
	This ID will go in the 2010AA loop in a REF segment that comes after all the normal REF segments. The `qualifier` becomes REF01 and the `id` becomes REF02. You can specify the ID for all providers or for individual providers. The *eb.ini* key value is `2010aaref_` and the word `all` for all providers, or the individual provider's MicroMD PM `ID`. The system looks at the individual provider before looking at an all line. This means you can have both in the *eb.ini* at the same time.
	
	Example: Under BSGA in the *eb.ini*, you would type the following to include all providers in the system in the 2010AA loop when you submit their claims:
	
	`[BSGA1]`
	
	`2010aaref_`**`all`**`=qualifier=`**`G5`**`;id=`**`12345`**`;`
	
	Or you would type the following to include the provider with the MicroMD PM id `1` in the 2010AA loop of the claim file.
	
	`[BSGA1]`

Keyname	Description
	`2010aaref_`**`1`**`=qualifier=`**`G5`**`;id=`**`56789`**`;` You **must** have semicolons after the values in order for this feature to function properly.

Sample eb.ini

```
[hyperaccess]
path=c:\hawin32\
exe=c:\hawin32\hawin32.exe

[ARCHIVE]
path=\\Server Name\MicroMD\archive
days=30

[mcoh1]
ahaw=prin1.haw
dtest=0
element=*
component=:
segment=~
claim=(zipfile)claims.zip;
report_delete=m.zip;m;bcl.zip;bcl;997.zip;997;claims.zip;
report_number=3
report1=(zipfile)m;(renamefile)m.zip;(printfile8)m;
report2=(zipfile)bcl;(renamefile)bcl.zip;(printfile10)bcl;
report3=(zipfile)997;(renamefile)997.zip;(997file)997;

[mcohrem1]
haw=mcohrem.haw
remit_delete= 835.zip;835;
remit=(zipfile)835;(renamefile)835.zip;(remitfile)835;
```

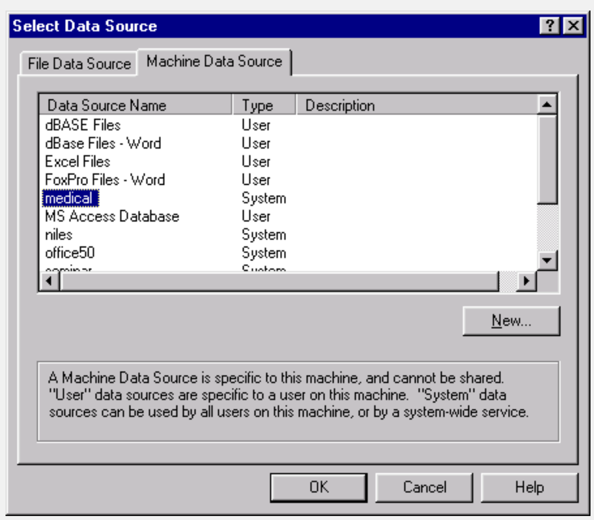
CODE LOAD

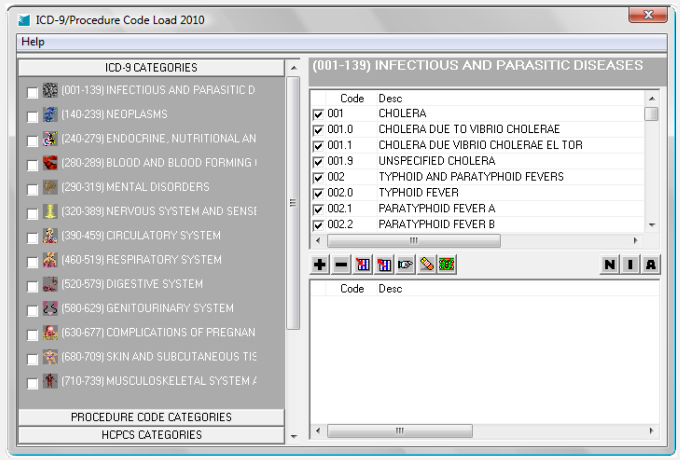
APPENDIX C

The Code Load program is an efficient way to import diagnosis and procedure codes to the system, saving the time of adding them manually. Code Load is an optional application, purchased separately.

USING CODE LOAD

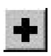
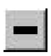
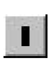
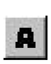
To load diagnosis and procedure codes, use the following procedure.

Procedure	Details
1. Add the Code Load program to the **Additional Modules** tab of the *Practice Preferences* window.	Refer to the *MicroMD PM Software Installation Manual* for further instructions on adding optional applications.
2. Insert the *MicroMD Installation and Tools* disc into drive.	The graphical front-end runs automatically.
3. Click *Extras*.	
4. Click *Code Load*.	Code Load launches automatically.
5. Click **Ok** in the *Copyrights* window.	A database selection window opens.
6. Select the proper version of MicroMD PM in the *Version* field.	
7. Select the correct database for Code Load and click **Accept**.	The *Select Data Source* dialog opens.
8. Click the **Machine Data Source** tab.	

Procedure	Details
9. Select the appropriate *Data Source Name* (DSN).	The DSN is the alias for the database connection. This is typically *medical*.
10. Click **OK**.	The *ICD-9/Procedure Code Load* window is now available.
11. Click the *ICD-9 Categories* bar in the left-hand frame.	 The *Categories* section (on the left side) lists the categories of codes. The *Source* section (upper) lists the codes to select. The *Target* section (lower) has the codes selected to import.
12. Select the desired category of ICD-9 codes by clicking on the icon for that category.	When choosing different categories, the *Source* section shows only ICD-9 codes in that category. The checkboxes next to each category allow you to select multiple categories for input at one time.
13. Drag and drop or use the **Add Selected** icon to move data from the *Source* window to the *Target* window.	If you do not want a code in the *Target* section, just unselect the item by clicking on the check mark next to the item to remove it.
14. Repeat steps 12 and 13 for each additional category of ICD 9 and HCPCS codes.	
15. Click the **Import** icon to import the data in the target window.	
16. Click the *Procedure Code Categories* or *HCPCS Categories* bar in the Categories section of the window.	**STOP |** When switching between categories, you must first import the current data. You will lose the data in the target window if it is not imported.
	When choosing different categories, the *Source* section shows only codes in that category. The checkboxes next to each category allow you to select multiple categories for input at one time.

Procedure	Details
17. Select the desired category of codes by clicking on the icon for that category.	
18. Drag and drop or use the **Add Selected** icon to move data from the *Source* section to the *Target* section.	If you do not want a code in the *Target* section, just unselect the item by clicking on the check mark next to the item to remove it.
19. Repeat steps 17 and 18 for each additional category of codes.	
20. Click the **Import** icon to import the data in the target window.	Loading the codes is now complete.

CODE LOAD ICONS

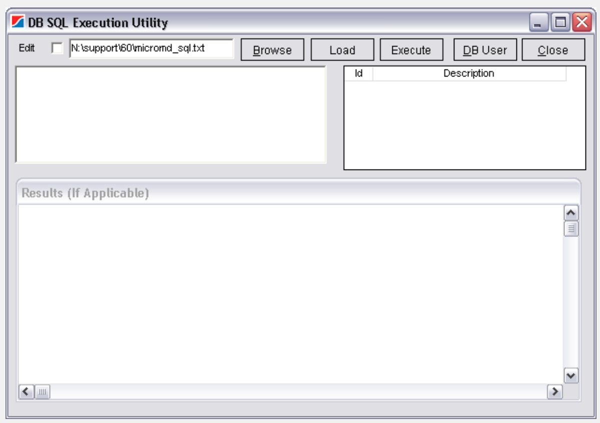
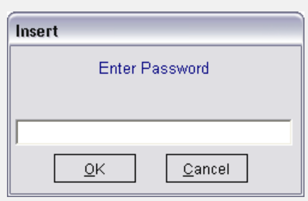
Icon	Name	Description
	Add Selected	Adds the selected codes in the *Source* section to the *Target* section.
	Remove Selected	Removes the unselected codes from the *Target* section.
	Select All	Selects all the items in the *Source* section.
	Deselect All	Unselects all the items in the *Source* section.
	Import	Imports all the selected data in the *Target* section into MicroMD PM.
	Erase Target	Erases all data in the *Target* section.
	Clear Fees	Clears all selected fees and RVUs in the *Target* section.
	New Codes	Allows only the new codes for the category selected to appear in the *Source* section.
	Inactive Codes	Allows only the inactive codes for the category selected to appear. MicroMD PM pulls the Active Thru date for the program from the Effective Thru date in the *Source* section of Code Load.
	All Codes	Allows all the codes for the category selected to appear in the *Source* section.

APPENDIX D

RUNNING SQL SCRIPTS AGAINST A MICROMD PM DATABASE

These instructions walk you through the steps for running a SQL script to modify a MicroMD PM database, such as checking the *Apply Fin Chgs* checkbox on all patient detail windows.

> **STOP** | This is for MicroMD PM Support and Reseller Support personnel only. Remember this allows you to perform a process that changes the data in the database tables. Not all information that was within the changed fields is recoverable.

Procedure	Details
1. Make sure all users have logged out of MicroMD PM.	
2. You must then login to MicroMD PM with user name: micromd	
3. Go to **Utility** > **Database Utilities** > **SQL Utility**.	The *DB SQL Execution Utility* window opens. 
4. Check the *Edit* checkbox at the top left of *DB SQL Execution Utility* window.	The *Insert* window opens. 
5. Type the password in the *Insert* window and click **OK**.	

Procedure	Details
6. You now can paste or type the SQL script into the text box at the top left of the *DB SQL Execution Utility* window. OR a. Choose a canned SQL script from the list in text box at the top right of the *DB SQL Execution Utility* window. b. Click the **Load** button at the top of the *DB SQL Execution Utility* window. (You may need to browse to the location of the canned SQL.) c. Highlight the SQL script you want to run.	b. This loads the list of canned SQL scripts. c. This pastes the script from the file into the text box on the left. **STOP |** You may have to edit variables within the script before executing.
7. Click the **Execute** button.	This runs the SQL on the MicroMD PM database. The *Results* section of the window displays the changes made in the database, if applicable.

EXTERNAL APPLICATION ACCESS TO DATABASE

When using external applications, such as Crystal Reports or other third-party applications that require access to the database, you must create user names and passwords for each of them.

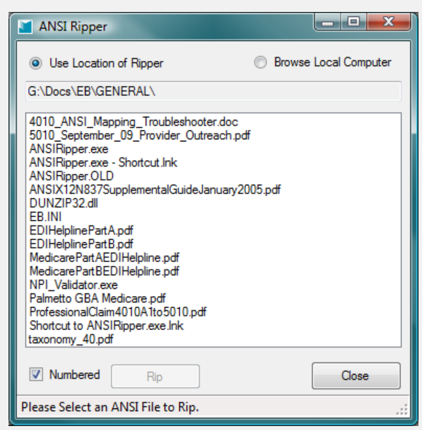
> **NOTE \|** Contact Henry Schein Medical Systems, Inc. to obtain a key code for this function.

Procedure	Details
1. Log in to MicroMD PM with the user name: micromd	
2. Select **Utility** > **Database Utilities** > **SQL Utility** from the main menu.	The *DB SQL Execution Utility* window opens.

Procedure	Details
3. Click the **DB User** button.	The *Activate Database User* window opens. 
4. Enter a user name and password in the *Username* and *Password* fields.	For those applications that need additional access to the database, check *DBA Equivalent*.
5. Enter the password again in the *Re-enter* field to confirm.	
6. Click **Accept**.	The system prompts you for a security key code. Contact Henry Schein Medical Systems, Inc. for this code.
7. Enter a valid key code and click **OK**.	

ANSI RIPPER

One of the more useful tools created by the development team is the ANSI Ripper program. This simple executable file allows you to "rip" the ANSI file to a more human-friendly format. The new file created during this "rip" allows you to view the segments and loops in the claim file. For troubleshooting purposes, this is useful to pinpoint where the user entered incorrect information that may have caused the carrier to reject the file.

Procedure	Details
1. Navigate to the *ANSIRipper.exe* file and double-click to launch.	The *ANSI Ripper* window opens. 
2. Select the **.ans* file you want to rip.	
3. Click **Rip**.	The program converts your **.ans* file to a **.ans.r* file that you can view using Microsoft's Notepad program.

Procedure	Details
4. Repeat this procedure for any other ANSI files you want to rip.	
5. Click **Close** when finished.	

CREATING CUSTOM MENUS/ICONS IN MICROMD PM

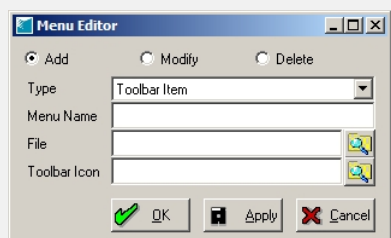
You can define custom menu items for MicroMD PM and icons for the floating toolbar of the *Patient Detail* window. The new icon will appear on the patient floating toolbar and anywhere else that the toolbar appears within MicroMD PM. The menu items appear in either the **Add-Ons** menu (for programs and links to documents) or the **Help** menu (for web site links).

> **STOP |** This function is available only for resellers and developers of MicroMD PM. It is not intended for a client to perform.

There is space allocated on the MicroMD PM menu for three different types of menu items. These items function similar to shortcuts. This feature allows support personnel to create custom menus for the client to launch external programs from within MicroMD PM.

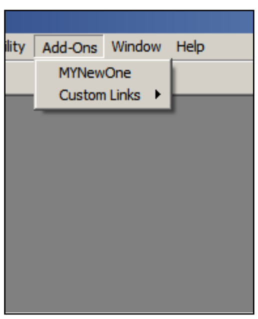
> **NOTE |** These customizations are workstation-specific.

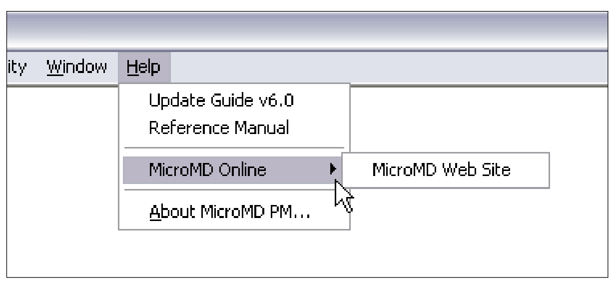
There is an application available to you (*menu.exe*) that allows you to create this custom icon for the client. This utility makes customizing toolbars and menus much easier than editing the client's registry.

Procedure	Details
1. Navigate to the *menu.exe* file: *x:\Program Files\HSI\MicroMD Common\Bin* **NOTE |** For 64 bit clients, Navigate to the *menu.exe* file: *x:\Program Files x86\HSI\MicroMD Common\Bin*	The *Menu Editor* window opens. 
2. Click the *Add* option to create a new item.	You can also *Modify* or *Delete* the item by choosing those options.
3. Select the item you want you add from the *Type* drop-down list.	*Custom Link* (1 through 16) These open reports or other documents on the system. They differ from launching programs in that they are menu-launched, with no shortcut keys. *Program* (1 through 8) These have a predefined shortcut key (**Shift F**(**1** through **8**)) and are meant to link to external modules or executables.

Procedure	Details
	Toolbar Item These appear on the patient floating toolbar wherever it appears in the program. *Web Site* (1 through 8) These display web pages.
4. Enter the label for the item as you want it to appear in the program in the *Menu Name* field.	This pop-up appears when the mouse hovers over the icon or the words you click to open the menu.
5. Click the **Search** icon next to the *File* field to navigate to the file you want the menu item or icon to launch when clicked.	You can also type the path to the file in the *File* field and include any parameters needed to execute the item.
6. Click the **Search** icon next to the *Toolbar Icon* field to navigate to the image you want to use for the icon.	If you are creating a menu item, you can leave this field blank.
7. Click the **Apply** button to set your changes.	
8. Click **OK** to finish and exit the window.	

When MicroMD PM opens, it inspects the registry and activates the defined menu items under a menu called **Add-Ons**. Web pages can be linked and displayed in the menu under the **Help** > **MicroMD Online** menu item.





Passing Parameters

Parameters can be passed to programs, custom links and URLs by including a marker in the menu executable string (in the *File* field on the *Menu Editor* window) that will be substituted by MicroMD PM at the time of execution. These values come from the currently active MicroMD PM session.

The list of markers available now includes:

Marker	Description
[account]	last MicroMD PM patient opened in the format: practice_id + '-' + guarantor_id + '.' + patient no
[dsn]	data source name to which the user is connected
[currentpractice]	current practice open under the user's login

Marker	Description
[currentuser]	current user logged into MicroMD PM
[guarantor_id]	last MicroMD PM guarantor_id (same as the guarantor_id in [account])
[patient_no]	last MicroMD PM patient_no (same as the patient no in [account])
[driver]	ODBC database driver
[server]	ODBC engine name - database server name
[database]	ODBC database name

Registry Reference

The following is what MicroMD PM defines in order to activate the menu items. Experienced users can edit the registry appropriately. Do not attempt this if unfamiliar with this editor.

HKEY_CURRENT_USER\Software\MICROMD\Menu

\Program1 (can be 1 up to 8)

\MenuText — This string value displays in the MicroMD PM menu.

\MenuExecutionString — This string value holds the executable and any parameters.

\CustomLink1 (can be 1 up to 16)

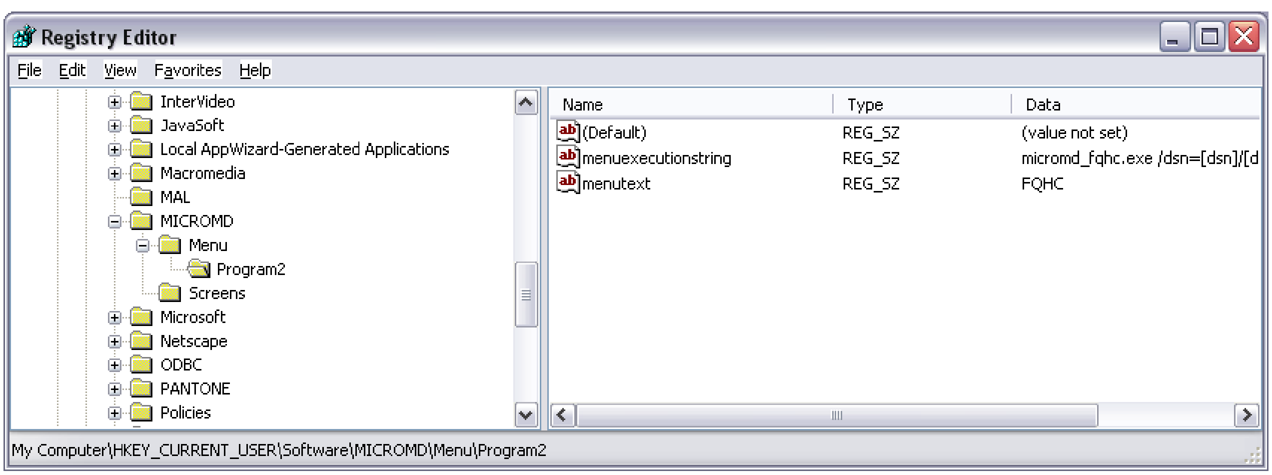
\MenuText — This string value displays in the MicroMD PM menu.

\MenuExecutionString — This string value holds the executable and any parameters.

\WebSite1 (can be 1 up to 8)

\MenuText — This string value displays in the MicroMD PM menu.

\MenuURL — This string value holds the URL.



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